

Divorce Checklist

Divorce is an emotionally stressful time filled with fear of the unknown and worries about your financial well-being. This checklist can help you to realistically focus on your financial situation, which can aid in reducing your stress level. It's essential to take a look at budgeting, investing, retirement, and other financial planning issues during this significant life transition.

« FINANCIAL FACTORS:

- | | |
|---|--|
| <input type="checkbox"/> Current income and expenses | <input type="checkbox"/> Social security considerations
(if married 10 years or more) |
| <input type="checkbox"/> Future financial needs and budgeting | <input type="checkbox"/> Tax consequences |
| <input type="checkbox"/> Retirement accounts | <input type="checkbox"/> Arbitration vs. hiring an attorney |
| <input type="checkbox"/> Pensions | <input type="checkbox"/> Handling of Qualified Domestic
Relations Order (QDRO) |
| <input type="checkbox"/> Bank Accounts | |
| <input type="checkbox"/> Financial plan updates | |

« LEGAL DOCUMENTS:

- | | |
|--|--|
| <input type="checkbox"/> Will | <input type="checkbox"/> Asset/account structure |
| <input type="checkbox"/> Power of attorney (POA) | <input type="checkbox"/> Health care directive |
| <input type="checkbox"/> Beneficiary updates | <input type="checkbox"/> Estate plan updates |
| <input type="checkbox"/> Asset titling | <input type="checkbox"/> Name change (if applicable) |

« INSURANCE:

- | | |
|---|---|
| <input type="checkbox"/> Health insurance | <input type="checkbox"/> Life insurance |
| <input type="checkbox"/> Dental insurance | <input type="checkbox"/> Long-term care insurance |
| <input type="checkbox"/> Vision insurance | <input type="checkbox"/> Car insurance |
| <input type="checkbox"/> Disability insurance | <input type="checkbox"/> Homeowner or renters insurance |

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