



## Life Event Planning Checklist

### **Newly Divorced**

- Create a New Budget
- Review Financial Situation (Loss of Income, Change in Expense, Change in Assets)
- Create New Short and Long Term Financial Goals
- Review Life, Health, and Disability Insurance
- Update Estate Documents to Remove Ex-Spouse
- Reminder You May Be Eligible to Receive Spousal Social Security Benefits
- Review Ex-Spouse as Beneficiary on Accounts (Unless Court Required)
- If Minor Children are Involved, Review College Situation and Potential Need for Funding
- Review all of these items with your financial advisor

