



Divorce checklist

Ending a long-term relationship can be a juggling act – emotionally, intellectually and financially – but taking action now can help you create a steady, secure future.

Print our checklist and keep it handy. It can help you stay on track.

Make a budget.

Use a budget worksheet to record all your income and expenses.

Update your health insurance.

Review the rules for removing your former partner from your health insurance.

If you're the one without insurance, [research coverage](#).

Review beneficiaries.

Take time to review your beneficiaries on things like life insurance, retirement plans, bank accounts and other financial documents and make changes where necessary.

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Know who owes.

You may be entitled to [part of your former partner's retirement account](#), or he or she may be entitled to yours.

Find a real estate agent.

Whether you decide to [sell your house or stay](#), it's helpful to know how much it's worth.

List your assets.

Know how much you have. Include things like income, equity, support payments, investment income, real estate income, etc.

Prepare for taxes.

If you and your former partner share custody, agree on who will file as ["head of household"](#) when taxes are due.

Plan for retirement.

See if your [retirement savings](#) are on track. If not, brainstorm ways to save more and make more.

Adjust your investments.

Talk to your financial professional about rebalancing your portfolio and any other changes to your investment strategy.

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Build your team.

You're not in it alone. Make sure you've got the right [team of professionals](#) to help you create the life that you want.

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