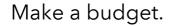


# **Divorce checklist**

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.



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.

Investments are not FDIC-insured, nor are they deposits of or guaranteed by a bank or any other entity, so they may lose value.

## **Divorce checklist**



#### 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.

# **Divorce checklist**



## 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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