Just Married:
Newlywed Estate Planning Checklist

Getting Started

Congrats on your recent nuptials! Now that you've said the vows and enjoyed a relaxing honeymoon, it's time to get down to business.

You're already sharing a life; now it's time to share some important info to get your matrimonial journey off to a great start. This checklist includes the following:

- Share Important Contacts
- Update Beneficiary Designations
- Open & Consolidate Accounts & Services
- Create Or Update Official Documents: Will, POA, & Advance Directive...
- Organize Important Documents & IDs So They're Easy To Locate
- Provide Access To Personal Digital Devices & Accounts

Changing Your Name? Use this checklist to make sure you don't forget to update accounts, documents, and IDs that will require your new handle.

Remember

[Create an Everplan](https://www.everplans.com) to easily and securely update and share all the vital info on this checklist with the people you love and trust.

IMPORTANT CONTACTS

Share the following contact info for each spouse.

- ☐ Doctor
- ☐ HR/Employer
- ☐ Financial/Accountant
- ☐ Insurance Agent
- ☐ Lawyer
- ☐ Other:________________________

Don't Forget: If you haven't already, add your spouse as the primary Emergency Contact on all documents and services requiring it.

UPDATE BENEFICIARIES

The following accounts need to be updated to reflect your spouse as the new beneficiary or transfer on death designation.

- ☐ Existing Checking/Savings Accounts
- ☐ Life Insurance (employer-based, stand alone policy)
- ☐ Stocks
- ☐ Bonds
- ☐ Mutual Funds
- ☐ Military Benefits
- ☐ 401(k)
- ☐ 403(b)
- ☐ IRA
- ☐ Roth IRA
- ☐ Pension (SEP / SARSEP)
- ☐ Trusts
- ☐ Other (property, titles, assets): ________________________

COMBINE RESOURCES

Accounts and services you might consider consolidating now that you're hitched.

- ☐ Open Joint Bank Account/Credit Cards
- ☐ Health Insurance
- ☐ Car Insurance
- ☐ Re-Title Property Ownership Documents (home, car)
- ☐ Mobile Phone Plan
- ☐ Duplicate Accounts/Services (example: Costco, Netflix):

____

____

Note 1: If you plan on keeping *separate accounts*, share that info too just in case.

Note 2: If you plan on keeping *secret accounts*, that's your call. We're no marriage experts, but it's probably not the best way to kick off a life together.

IMPORTANT DOCUMENTS TO CREATE

If you don't have these, create them; if you already have these, update the beneficiary information.

- [ ] Will
- [ ] Power Of Attorney
- [ ] Advance Health Care Directive(s)
- [ ] Trusts
- [ ] Other: ______________________________

OFFICIAL DOCUMENTS & ID

Let your spouse know where you keep the following, some of which will need to be updated if you're changing your name.

- [ ] Marriage Certificate
- [ ] Birth Certificate
- [ ] Social Security Card
- [ ] Passport
- [ ] Armed Forces ID / Discharge Papers
- [ ] Citizenship Documentation
- [ ] Prenuptial or Postnuptial Agreement
- [ ] Divorce Decree (previous marriages)
- [ ] Documents relating to any children you already have (example: adoption papers)

Don't Forget: If you're changing your name you'll need to update all your IDs.

DIGITAL ACCESS

Providing access to the following things can be extremely helpful in case of an emergency.

- [ ] Mobile Phone
- [ ] Computer(s)
- [ ] Tablet
- [ ] Home Security
- [ ] Password Manager
- [ ] Other: ______________________________

DIGITAL ACCOUNTS / SERVICES

This includes shared household accounts and personal accounts that can provide value to your spouse.

- [ ] Home Utilities (power, cable, etc.)
- [ ] Health / Medical (insurance provider, prescriptions)
- [ ] Financial / Money Management
- [ ] Entertainment (Video / Music / Gaming)
- [ ] Shopping (Amazon)
- [ ] Food / Delivery Services (Fresh Direct)
- [ ] Cloud Storage (photos, media)
- [ ] Travel / Rewards (example: frequent flyer miles)
- [ ] Other (Example: organization, productivity): ______________________________

NOTES & PERSONAL THOUGHTS

Use this section for any important information, personal thoughts, or anything we may have missed. Remember, you can do this all online. Create an Everplan so this info, along with much more, is neatly organized, securely stored, and easy to share with the people you care about most.

CREATE YOUR EVERPLAN NOW: www.everplans.com

Create, store, and share all of the information in this document (and so much more) in a personalized Everplan so it's accessible to those who will need it.