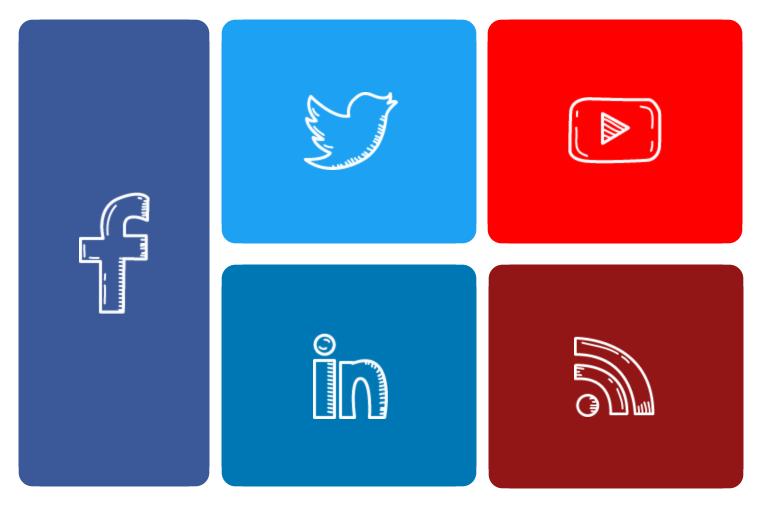
Married Life Money Checklist



Check the box to the right once you have completed the task.	Spouse 1	Spouse 2
Take a financial inventory. Make sure you have a detailed understanding of your individual and joint assets, incomes, and debts.		
Run a credit check. Your credit scores will affect various financing in your future. If there are credit issues, you need to address this before getting married. Go to AnnualCreditReport.com		
Make a joint budget. Even if you don't have shared bank accounts, you will have shared expenses. Review who pays for what.		
Confirm your beneficiary information. Once you're married, your spouse will become the default primary beneficiary on your accounts. If you have other preferences, make sure to update your accounts.		
Write or update your will. Being married will change certain estate planning presumptions. Make sure to update your information on your bank accounts and retirement accounts.		
Confirm your tax withholding at work. Review the impact of marriage on your tax situation with your tax preparer. Make any necessary changes on your W-4 through payroll.		
Discuss financial roles. Who will pay bills and who will handle long- term investments? Outline your joint financial goals. Do you have student loans or retirement contribution plans? Now is the time to discuss.		
Discuss a prenuptial agreement. Review your desire or need for a prenuptial agreement.		
Update your insurance plans. Coordinate your plans and see who has better medical benefits. Update the plan to confirm all family members are listed.		



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