

I have my signed agreement- Now What?

INVOLVED PARTIES

	You	Financial Advisor	Attorney	Ex	Third Party
<input type="checkbox"/> GENERAL Add critical dates from your agreement to your calendar	✓	✓			
<input type="checkbox"/> Get a certified copy of your divorce decree, create a digital copy, save a physical and digital copies in a safe place	✓				
<input type="checkbox"/> Get organized & stay organized	✓				
<input type="checkbox"/> Create a budget and regularly review it	✓	✓			
<input type="checkbox"/> If you changed your name, make sure it is updated at your employer, financial institutions, etc	✓				
<input type="checkbox"/> Change passwords to online accounts	✓			✓	
<input type="checkbox"/> Implement and follow parenting plan (if applicable)	✓				✓
<input type="checkbox"/> Work with an Estate Attorney to draft new estate plan documents (will, power of attorney, advance care directive)	✓				✓
<input type="checkbox"/> Revoke Power of Attorney (if applicable)	✓				
<input type="checkbox"/> Be kind to yourself	✓				
<input type="checkbox"/> MARITAL ASSETS Separate funds in accounts, per settlement agreement terms	✓	✓			
<input type="checkbox"/> Update titles on all applicable assets (financial, retirement, vehicle, real estate, etc)	✓	✓			
<input type="checkbox"/> Work with a QDRO preparer to divide retirement assets	✓		✓		✓
<input type="checkbox"/> Update beneficiaries	✓	✓			
<input type="checkbox"/> If you are selling house, work with realtor to put your house on the market	✓				✓
<input type="checkbox"/> If you're staying in your house & buying out your spouse's equity in the home, remove your spouse from the title and mortgage	✓				✓
<input type="checkbox"/> If your spouse is staying in the home & buying out your equity in the home, ensure that you're removed from the title & mortgage	✓				✓

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MARITAL DEBT

<input type="checkbox"/> Contact creditors of joint accounts to remove your name from any accounts assigned to your ex in the divorce	✓				
<input type="checkbox"/> Contact creditors of joint accounts to remove your ex's name from any accounts assigned to you in the divorce	✓				
<input type="checkbox"/> Review your credit report, check for errors and discrepancies	✓				
<input type="checkbox"/> Establish a credit card in your own name (if you do not already have one) to improve your credit	✓				

TAXES

<input type="checkbox"/> Update tax withholding status and deductions from payroll	✓				
<input type="checkbox"/> Notify and consult with tax professional	✓				✓
<input type="checkbox"/> Adhere to the terms of your decree & consult your tax professional in regard to child-dependent claims and tax exemptions	✓				✓

INSURANCE

<input type="checkbox"/> Change/remove your spouse from any insurance policies (medical, dental, vision, auto) – unless otherwise specified in your divorce	✓				
<input type="checkbox"/> If COBRA or marketplace health insurance is needed, apply for it within 60 days of your divorce finalization	✓				
<input type="checkbox"/> Establish or update life insurance policy and follow documentation instructions (if applicable)	✓	✓			

NOTES

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