
Post Wedding Day to Do's



Wedding butterflies are dimming down, schedules are back to normal and back to life you go. Before that happens, review and complete the items listed below. I have seen people procrastinate not just months but years! Don't do it!

Update names and change beneficiary designations

- Insurance policies
- Bank accounts
- Retirement plans
- Investment plans

Review Life Insurance Coverage and update names

- Just FYI: You will most likely have to provide a copy of your marriage certificate to update your name.

Review Auto Coverage and update names

- You may be able to save money by creating a joint policy among other ideas your insurance agent may suggest.

Coordinate Workplace Benefits

- Review benefits you are both offered and take advantage of what's not offered at your own employer. Ex: You may not have health insurance, but your spouse does. Most employers offer a window of time after you get married so don't wait!
- Outside of work make sure you meet with an insurance or financial professional to review. Most employee benefits you don't personally own therefore if you change jobs the benefits will not go with you.

Update Emergency Contact List

- With your employer, doctors, etc.

Update/Complete your Estate Planning

- A lot of families defer this task because of the price tag they imagine it to be. This does not have to be a huge extensive task. Work with a trusted attorney, express your concerns and start with the basics.

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*Dedicated to the friends, clients, and prospects of Sarah McAllister

