

POST – DIVORCE CHECKLIST

This is a Post-Divorce checklist that you should consider completing over the course of the next 3 months to a year to help put your financial affairs in order.

- 401k spousal transfer to your IRA account
- Investment account re-titling of taxable accounts
- Transfer of company pension benefits to your own account
- Re-finance of current mortgage to your single name only
- Set up of new Term Life Insurance designed to protect divorce settlement agreement
- Set up of Children's education accounts
- Post- divorce investment portfolio allocations
- Beneficiary updates & changes for Wills, Trusts, & Investment accounts
- Set up new health & dental care coverage for yourself and children
- Set up new homeowners or renter's insurance
- Set up new car insurance for self
- Set up Disability & Long Term Care coverage for self
- Retirement Planning.

If you have any questions about this Post-Divorce checklist, please give Richard Hendry a call at 678-578-2430 or email us at rich.hendry@raymondjames.com. Visit us at www.richardhendry.net.