

# I have my signed agreement- Now What?

## INVOLVED PARTIES

You Financial Advisor Attorney Ex Third Party

### GENERAL

<input type="checkbox"/>	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	✓				

### MARITAL ASSETS

<input type="checkbox"/>	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

☐ Contact creditors of joint accounts to remove your name from any accounts assigned to your ex in the divorce

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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☐ Contact creditors of joint accounts to remove your ex's name from any accounts assigned to you in the divorce

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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☐ Review your credit report, check for errors and discrepancies

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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☐ Establish a credit card in your own name (if you do not already have one) to improve your credit

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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### TAXES

☐ Update tax withholding status and deductions from payroll

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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☐ Notify and consult with tax professional

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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☐ Adhere to the terms of your decree & consult your tax professional in regard to child-dependent claims and tax exemptions

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
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### INSURANCE

☐ Change/remove your spouse from any insurance policies (medical, dental, vision, auto) — unless otherwise specified in your divorce

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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☐ If COBRA or marketplace health insurance is needed, apply for it within 60 days of your divorce finalization

<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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☐ Establish or update life insurance policy and follow documentation instructions (if applicable)

<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
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### NOTES

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