

Getting married

While planning for a wedding can be a huge task, it's just as important to establish a financial strategy for the marriage.

CONSIDER:

- ☐ Saving for the wedding
- ☐ Calculating your combined net worth:
 - ☐ Annual income
 - ☐ Bank accounts
 - ☐ Investments
 - ☐ Real estate
 - ☐ Retirement accounts
 - ☐ Life insurance
- ☐ Determining your combined debt:
 - ☐ Student loans
 - ☐ Car loans
 - ☐ Credit cards
 - ☐ Mortgages
- ☐ Adding up monthly expenses
- ☐ Determining your long-term and short-term financial goals
- ☐ Creating a budget
- ☐ Deciding what to do with your incomes:
 - ☐ Joint accounts
 - ☐ Separate accounts
 - ☐ Both
- ☐ Deciding who will pay which bills
- ☐ Starting an emergency fund with three to six months of living expenses
- ☐ Saving for retirement or increasing your contributions
- ☐ Reviewing and updating life insurance coverage
- ☐ Updating paperwork:
 - ☐ Driver's license
 - ☐ Social Security card
 - ☐ Passport
 - ☐ Bank accounts
 - ☐ Credit cards
- ☐ Updating or creating your will
- ☐ Updating beneficiary designations on life insurance and retirement accounts

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