**Premier Insurance Contracts, Inc**
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# Getting Married Checklist

## Getting Married Checklist

| General information | Yes | No | N/A |
|---|---|---|---|
| 1. Has relevant personal information been gathered?<br>• Names, ages, health statuses<br>• Dependents<br>• Children from previous marriages | ❑ | ❑ | ❑ |
| 2. Has financial situation been assessed?<br>• Income<br>• Expenses<br>• Assets<br>• Liabilities | ❑ | ❑ | ❑ |
| Notes: | | | |

| Money management | Yes | No | N/A |
|---|---|---|---|
| 1. Have assets been itemized separately/together? | ❑ | ❑ | ❑ |
| 2. Have debts been itemized separately/together? | ❑ | ❑ | ❑ |
| 3. Has an apportionment of responsibility for expenses been determined? | ❑ | ❑ | ❑ |
| 4. Have separate/joint savings plans been discussed? | ❑ | ❑ | ❑ |
| 5. Will separate/joint checking/savings accounts be used? | ❑ | ❑ | ❑ |
| 6. Has a record-keeping system been devised? | ❑ | ❑ | ❑ |
| 7. Are there any credit history concerns? | ❑ | ❑ | ❑ |
| Notes: | | | |

| Housing | Yes | No | N/A |
|---|---|---|---|
| 1. Homeowner? | ❑ | ❑ | ❑ |
| 2. If not, is a home purchase planned? | ❑ | ❑ | ❑ |
| 3. Have home ownership options (e.g., joint, sole) been considered? | ❑ | ❑ | ❑ |

| Notes: |
|---|

| Insurance planning | Yes | No | N/A |
|---|---|---|---|
| 1. Is health insurance needed? | ❑ | ❑ | ❑ |
| 2. Will separate health insurance plans be maintained? | ❑ | ❑ | ❑ |
| 3. Will health coverage be combined? | ❑ | ❑ | ❑ |
| 4. Does life insurance need to be purchased/upgraded? | ❑ | ❑ | ❑ |
| 5. Does automobile insurance need to be purchased/upgraded? | ❑ | ❑ | ❑ |
| 6. Does homeowners/renters insurance need to be purchased/upgraded? | ❑ | ❑ | ❑ |
| 7. Does disability income insurance need to be purchased/upgraded? | ❑ | ❑ | ❑ |
| 8. Does personal liability insurance need to be purchased/upgraded? | ❑ | ❑ | ❑ |
| 9. Will beneficiary designations be changed? | ❑ | ❑ | ❑ |
| Notes: | | | |

| Investment planning | Yes | No | N/A |
|---|---|---|---|
| 1. Have investment profiles been determined separately/together? | ❑ | ❑ | ❑ |
| 2. Have investment goals separately/together been considered/prioritized? | ❑ | ❑ | ❑ |
| 3. Has size/frequency of investments been determined? | ❑ | ❑ | ❑ |
| 4. Are separate/joint investments contemplated? | ❑ | ❑ | ❑ |
| 5. Are there current investments?<br>• Stocks<br>• Bonds<br>• Mutual funds<br>• Annuities<br>• Real estate<br>• Art/collectibles | ❑ | ❑ | ❑ |

Notes:

| Retirement planning | Yes | No | N/A |
|---|---|---|---|
| 1. Is a retirement plan available?<br>• IRA<br>• Employer-sponsored retirement plan<br>• Beneficiary designation | ❑ | ❑ | ❑ |
| 2. Will one or both plans be funded? | ❑ | ❑ | ❑ |

Notes:

| Estate planning | Yes | No | N/A |
|---|---|---|---|
| 1. Is there a will? | ❑ | ❑ | ❑ |
| 2. Will changes be made to the will? | ❑ | ❑ | ❑ |
| 3. Is there a trust? | ❑ | ❑ | ❑ |
| 4. Has setting up trusts been considered? | ❑ | ❑ | ❑ |
| 5. Have durable power of attorneys been considered? | ❑ | ❑ | ❑ |
| 6. Have health-care directives been established? | ❑ | ❑ | ❑ |
| 7. Are spousal property transfers anticipated? | ❑ | ❑ | ❑ |
| 8. Is there a concern about equalizing estates? | ❑ | ❑ | ❑ |

Notes:

**IMPORTANT DISCLOSURES**

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