Valecka Wealth Management
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Getting Married Checklist

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General information	Yes	No	N/A
1. Has relevant personal information been gathered? • Names, ages, health statuses • Dependents • Children from previous marriages	❑	❑	❑
2. Has financial situation been assessed? • Income • Expenses • Assets • 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? • Stocks • Bonds • Mutual funds • Annuities • Real estate • Art/collectibles	❑	❑	❑

Notes:			
Retirement planning	**Yes**	**No**	**N/A**
1. Is a retirement plan available? • IRA • Employer-sponsored retirement plan • 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:			

The opinions voiced in this material are for general information only and are not intended to provide specific advice or recommendations for any individual. To determine which investment(s) may be appropriate for you, consult your financial advisor prior to investing. All performance referenced is historical and is no guarantee of future results. All indices are unmanaged and cannot be invested into directly.

The information provided is not intended to be a substitute for specific individualized tax planning or legal advice. We suggest that you consult with a qualified tax or legal advisor.

Jan Valecka is a Registered Representative with Valecka Wealth Management and Securities and Advisory Services offered through LPL Financial, a Registered Investment Advisor. Member FINRA/SIPC

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