

unhitch

a different way through divorce

Checklist for financial security and wellbeing

There are typical areas of need for planning during big life transitions like separation and divorce, according to unhitch guest speaker and Certified Financial Planner Laura Fralick. Check these items off as you work your way through the list, maybe with the help of a planner or accountant as needed. We've left room at the end to add other goals and items to your checklist.

- Updating beneficiaries for your various accounts, insurance, group benefits, pension
- Tax planning
- Resetting family budgets/auditing your expenses and income streams
- Ensuring that you are working with your lawyer to get a Will, Powers of Attorney
- Continuing (or getting) health and dental coverage
- Reviewing, updating or getting Life Insurance and Critical Illness Insurance
- Mortgage qualification or application
- Debt-reduction planning
- Education accounts for children, special arrangements for children with disabilities
- Gathering documents for your lawyer and accountant
- _____
- _____
- _____