

NAME CHANGE CHECKLIST

THE WELKA WEALTH TEAM AT VFG ASSOCIATES
FALCON FILM STUDIOS

Get a few extra certified copies of your marriage certificate and make digital copy of it

Change your name with the Social Security Administration

Update your Passport

Update your Driver's License

Update name with the Post Office

Change name and add spouse to all checking accounts.

Add Beneficiary to checking accounts

Change name and add spouse on all savings accounts

Add Beneficiary to savings accounts

Change name and add spouse to all money market accounts

Add beneficiary to all money market accounts

Change name and add spouse to all bank certificate of deposits or notes

Add Beneficiary to all certificates of deposits or notes

Change name and add spouse to all brokerage accounts

Add Beneficiary to brokerage accounts

Change name on all retirement accounts

Add beneficiary to all retirement accounts

Change name on all life insurance policies

Add spouse as beneficiary to all life insurance policies

Change name on health insurance policies and pharmacies

Change name on all rental agreements and add spouse / update mortgage information with correct name and add spouse

If real estate is owned, create a quick claim deed created by a lawyer to change your name and add your spouse to your real estate

Change name on all disability insurance policies

Change name on all homeowner's or renter's insurance policies

Change name on credit cards and add spouse

Change name on liabilities (student loans, auto loan, etc.)

Request new checks from your bank

Change name with the IRS

Change name with Human Resources

Change name on email accounts

Change name on social media accounts

Change your name on your memberships and subscriptions

Change your name on your professional licenses and designations

DON'T FORGET

TO CHECK OUT BEYOND THE BELLS FOR EVERYTHING THAT COMES ALONG AFTER YOUR WEDDING

(734) 365-4283

WWW.FALCONFILMSTUDIOS.COM

CONTACT TIFFANY WELKA ON THE WELKA WEALTH TEAM AT VFG ASSOCIATES FOR MORE ASSISTANCE AND FINANCIAL ADVISORY SERVICES, ESPECIALLY "FINANCIAL HARMONY" A 7 STEP PROGRAM FOR ENGAGED AND MARRIED COUPLES!

WWW.WELKAWEALTH.COM

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