Celebrating Over 30 Years...

J. Charles Dunham CFP®, CRPC® Comprehensive Wealth Planner

Charles.Dunham@lfg.com Telephone: (205) 263-5318 www.FirstFinancialGroupInc.com



...and Supporting You for the Next 30

John "Goose" Dunham Comprehensive Wealth Planner

John.Dunham@lfg.com Telephone: (256) 548-2158 www.JCDFinancialServices.com

Life Event Planning Checklist: Getting Married

\bigcirc	Create new projections with updated cash flow
\bigcirc	Review updated liquidity needs
\bigcirc	Review and update financial goals- new short and long-term goals because
	of marriage
\bigcirc	Pre-nuptial agreement
\bigcirc	Make sure all estate documents are updated
\bigcirc	Take a look at balance sheet and update assets and liabilities
\bigcirc	Decide on titling of accounts- joint accounts or separate?
\bigcirc	Decide on beneficiaries for accounts
\bigcirc	Review tax situation with CPA
\bigcirc	Review insurance to make sure there's sufficient coverage
\bigcirc	Review all of these items with your financial advisor

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