

Checklist – Marriage preparation



CHECK LIST

1. Do you have any debts?

Yes No

If yes, please list amounts and estimated payoff dates:

2. List your salary: _____

3. Are you entitled to any pensions, stock options or insurance benefits at work?

Yes No

If yes, please list their values and any named beneficiaries:

4. Do you have an investment portfolio?

Yes No

If yes, list its value, how and by whom it's managed, and any maturity dates or named beneficiaries:

5. Do you have any personal insurance policies?

Yes No

If yes, please the names and types of policies, their values, and all named beneficiaries:

6. Do you have a will?

Yes No

If yes, when was it last updated:

7. Do you have powers of attorney?

Yes No

If yes, who are your powers of attorney, and when were your agreements last updated? Please be specific if there are different attorneys for personal care and financial matters:

8. Do you anticipate any inheritances or windfalls?

Yes No

Please provide details: _____

9. Please list any additional assets or liabilities not already disclosed:
