

Marriage Planning Considerations

Marriage is one of the most major commitments in your lifetime with far-reaching impact on you and everyone involved. While other professionals may help you determine compatibility in many important aspects of marriage, Transition Planning, Inc. can help you examine the economic impact on you and your family. This is done in two phases, with the services for each phase offered below:

Phase 1 – Pre-Marital Agreement Planning

- Discover Values-based Goals and Priorities for each person (Who do you want to benefit and why? What do you want to happen?)
- Review financial statements for each party
 - Net Worth
 - Asset Ownership Arrangements
 - Beneficiary Designations
 - Income Sources and Amounts
 - Fixed and Variable Expenses
 - Insurance Coverage
 - Medical
 - Disability Income
 - Life Insurance
- Are there any Dependents or Special Needs?
- What will be the economic effect on/of extended family relationships?
- Who will make financial decisions and how? Why?
- How does each person feel about financial risk?
- How does each person feel about debt? Saving? Planning ahead?
- Will any Business Relationships or Obligations be impacted?

Phase 2 – Post-Wedding Follow-through

- Review Values-based Goals and Priorities as a new couple – has anything changed?
- Update Ownership Arrangements
- Update Beneficiary Designations
- Update Insurance coverage
- Implement Strategies for Financial Goals
- Refer to other Professionals as needed to update
 - Wills
 - Living Wills
 - Powers of Attorney
 - Trust Agreements
 - Business Agreements

Such major commitments may have a greater probability of success when all important factors are given proper consideration.

To get started, please complete our secure online confidential questionnaire so we can schedule a time to meet and discuss who and what is important to you at this time.

After you have submitted your questionnaire, we will contact you to schedule a 60-minute complimentary consultation to determine what your needs are, how we might work together, and if our relationship is the right fit for you. Upon mutual agreement, we will either continue working with you or refer you to other appropriate professionals.

Your ultimate success is up to you, and is our greatest desire. We look forward to hearing from you soon!