



## ***Legal Document Checklist***

	<b>Legal Tasks</b>	<b>Notes</b>
	Change bank account names	
	Send out Change of Address Cards	
	Change wills and insurance policies	
	Change beneficiary information on retirement plans and investments	
	Verify life insurance amounts and change beneficiary	
	Change health and dental insurance plan information	
	Change car insurance and registration information	
	Request new Social Security card	
	Change driver's license name	
	Add name to utility bills	
	Change passport name	
	Re-register to vote	
	Change property title / mortgage name	
	Change tax records with your employer and accountant	
	Change credit card information	
	Change club membership information	

Change business cards & stationary	
Change computer records & directories	
Change magazine, catalog, subscriptions	
Change school records (high school, college)	

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