***To Do List***

***Changes of Title, Name, Address***

You might find this helpful to organize next steps in terms of Titles.

There are more than most people realize and this lists almost all of the ones you are likely to have.

**Checklist of titles** that we need to transfer directions:

With your separation agreement in hand, review it to check each item on the following list which *has not yet been transferred* according to your agreement.

Once the transfer is completed, write the date on the right of the line next to the item.

Items likely needing change:

real estate deed

promissory note

mortgage

other

motor vehicles

title

title

title

title

power of attorney

power of attorney

other

stock

stock

bond

bond

bank account

bank account

bank account

bank account

other

investment account

investment account

IRA
IRA
IRA
IRA

Other

Special pet

special pet

other
membership

membership
ticket priorities
Other

Directions: complete the following checklist as they relate to your situation -if you need a separate piece of paper please use one

**Personal property** transfer checklist:

We have the following artwork, antique and collectibles which of been transferred in writing and in fact as follows: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Date transferred

Motor vehicle transfer checklist

Wife or husband and wife has/have transferred title or sign power of attorney to husband of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(vehicle description)

they transferred husband we’re husband and wife has/have transfer title or sign power of attorney to wife of \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_vehicle description

they transferred bank account transfer checklist:
only husbands name appears on the following bank accounts

bank

type of account

date transferred

only wife’s name appears on the following bank accounts

bank

type of account

date transferred

**Stocks, bonds and securities** transfer checklist:

stock/bond to home/ what date

**insurance** transfer checklist directions:

complete the following as you accomplish each transfer
husband has changed his insurance policies as follows: life insurance at \_\_\_\_\_(company) now benefits\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**life** insurance at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(company) now

benefits\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**health** insurance at \_\_\_\_\_\_\_\_\_\_\_\_\_\_(company) now covers\_\_\_\_\_\_\_\_\_\_\_\_

**car** insurance on \_\_\_\_\_\_\_\_vehicles is in his name only
wife has changed his insurance policies as follows: life insurance at

\_\_\_\_\_(company) now benefits\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**life** insurance at \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(company) now

benefits\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**health** insurance at \_\_\_\_\_\_\_\_\_\_\_\_\_\_(company) now covers\_\_\_\_\_\_\_\_\_\_\_\_
car insurance on \_\_\_\_\_\_\_\_vehicles is in her name only

Non-employee spouse has elected \_\_\_\_\_\_\_\_\_\_\_ number of years of COBRA

option through \_\_\_\_\_\_\_\_\_and completed the paperwork, so the coverage for

them will begin on \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_(date).

**Retirement** transfer checklist directions:

complete the following as you finish each transfer do on a separate piece of paper if necessary
retirement to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_whom/what date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Business** interests transfer checklist:

directions: complete the following as you finish each transfer. Do on separate piece of paper if necessary:

business interest to \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_whom/date\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Notice of **change of name** checklist directions:

Check off each of the following, for each of you, as needed, as you send or show them a conformed copy of your signed judgment along with whatever form they require for a change of name:

State department of motor vehicles (drivers license office)

Social Security office to change the name on your Social Security card

Bank

Credit union

Mortgage company

Every creditor and credit card each of you will continue to use

Dentist

Children school

Daycare

Doctor and or Kids’ Pediatrician

*The persons relating to your children are especially important if your last name will now be different from your children’s.* You probably do not need to supply a copy of the signed judgment most other people need to know about your name change but don’t forget to notify them. Some examples of places and people not to forget our the newspaper membership and personal correspondence.

We will handle joint mail as follows:

Other: