

# *Name and/or Address Update Checklist*

*Whether it's because of a marriage, a divorce or a change of residence, you've officially made some changes and now it's time to update your important documents.*

Below is a list of common items that may require an update after a name or address change. This is not a complete list, so remember to keep an eye out for the usage of your old name or address and make updates as needed.

You can tackle these all at once or a few at a time, but it's important to begin with the Social Security Administration if you're changing your name. If you have questions about these forms, it's best to contact the providers directly.

- |  |   |
|--|---|
| <input type="checkbox"/> Social Security Administration        | <input type="checkbox"/> U.S. Passport                                    |
| <input type="checkbox"/> Investment Accounts                   | <input type="checkbox"/> Vehicle Title, Registration, License             |
| <input type="checkbox"/> Retirement Accounts                   | <input type="checkbox"/> Internal Revenue Service                         |
| <input type="checkbox"/> Life Insurance Policies               | <input type="checkbox"/> Estate Documents                                 |
| <input type="checkbox"/> Disability Insurance Policies         | <input type="checkbox"/> Medical Offices                                  |
| <input type="checkbox"/> Bank Accounts                         | <input type="checkbox"/> Health Insurance                                 |
| <input type="checkbox"/> Employer Records & Benefits           | <input type="checkbox"/> Utility Companies                                |
| <input type="checkbox"/> Credit Cards                          | <input type="checkbox"/> Cell Phone Carrier                               |
| <input type="checkbox"/> National Voter Registration Form      | <input type="checkbox"/> Loans (ex: student loans)                        |
| <input type="checkbox"/> Online Services (Netflix & Hulu)      | <input type="checkbox"/> Email Address & Social Media                     |
| <input type="checkbox"/> Clubs/Professional Organizations      | <input type="checkbox"/> Personal/Professional Website                    |
| <input type="checkbox"/> Home/Auto/Umbrella Insurance Policies | <input type="checkbox"/> Loyalty Programs (Airline/Credit Cards/Shopping) |

Notes: