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Name Change Checklist

Congratulations! Now that the two of you have become husband and wife in the eyes of the law there are a few small items to address. Don't worry – they can wait until after the honeymoon but they should be completed as soon as possible after that.

- Marriage License: Contact your local county Register of Deeds to obtain copies of your marriage license/certificate. Your license, signed by the witnesses and the Reverend, was mailed to the local Register of Deeds on the first business day after your ceremony. We recommend obtaining three copies: one for you to keep with your important papers and two to be used by the interested parties listed below. You may need additional copies depending on the policies/requirements of the interested parties (some are content with viewing it and some are content with a photocopy while others may require a certified copy).
- Social Security: Download, fill out, and print the following form: <http://www.socialsecurity.gov/online/ss-5.html>. You'll need to send or bring the form along with a certified copy (copy obtained from your county's Register of Deeds) of your marriage license/certificate to your local Social Security office to inform them of your name change and to obtain a new Social Security card.
- Driver's License: The Department of Motor Vehicles will need to issue you a new driver's license number and new driver's license if either of you are changing your name as a result of the marriage. They will need to see a certified copy of your Marriage Certificate (one of the copies that you obtained from your county Register of Deeds) as well as your new Social Security card.
- Mortgage/Lease: You may wish to have your new spouse added to your mortgage or lease. Consult a family lawyer or mortgage broker for instructions. For leases, ask your property management company.
- Life Insurance: You may wish to add your spouse as a beneficiary on your life insurance policy or policies. You may also wish to review your current insurance and/or financial plans with your agent – marriage presents new needs that should be addressed. Consult your insurance agent for more information.
- Health Insurance: Contact your health insurance provider (or employer) to change your name and/or add your spouse to your existing policy.
- Auto Insurance: Contact your auto insurance agent to change your name and/or add your spouse to your existing policy.
- Renters/Home Owners Insurance: Contact your renters/home owner's insurance agent to change your name and/or add your spouse to your existing policy.
- Bank: Be sure to inform your bank that your name (and address, if applicable) has changed and/or to add your spouse to your existing accounts. If you have individual accounts that you will not be adding your spouse to, consider adding your spouse as POD (Payable On Death) to make sure that your spouse can access your accounts immediately should something happen to you. Most banks will need to see your Marriage License, new Social Security card, and new Driver's License
- Employer: Be sure to inform your employer that you have a new 'Emergency Contact'. Your employer will also help you add your spouse to your insurance and as a beneficiary to your 401(k) or other retirement plan.

Utilities: Be sure to inform the following utilities that your name has changed and add your spouse to your account

- Phone
- Cell Phone
- Cable/Satellite
- Internet
- Gas
- Power
- Water

This list, while not all inclusive, covers the most common name change needs. Remember - any business or organization that knows you by name needs to be notified. Good luck - and congratulations!