

NAME CHANGE WORKSHEET

The following is a list of suggested contacts that you may need to update. Check them off as you contact them because it is easy to lose track of who knows or doesn't. Keep notes as required, and follow up as necessary so that there are no hiccups in your services, finances or security. The first three headings are in sequential order. You will need to have or to get a *certified* copy of the Name Change Order, or have one issued if you did not get it at the time of your final divorce for all changes that have legal implications or liabilities. It's a good idea to keep this stuff in your wallet for a good few months until you know you've hit all the bases.

1. Social Security Administration

Get a new card with your new name. This will serve as proof for other changes. Filing the change is quick and easy, but it takes 7-10 biz days to receive the new card. Get the form online or call: 1-800-772-1213.

2. DMV

Never a fun time, but once you get your new social security card you need a new photo ID which will be required for all the steps below. Usually you can change your voter registration here.

Driver's license or photo identification card

3. Banking

To change your accounts you will have to visit the banks in person, they will have to issue new cards which will cancel the current card. We recommend you change only one account first, then once you have your new card, you can change the rest so you aren't stuck for a few days without a debit card. To get a new card the next days is often offered, but it'll cost you.

<input type="checkbox"/>	Personal Checking	<input type="checkbox"/>	Money Market Account
<input type="checkbox"/>	Personal Savings	<input type="checkbox"/>	Mortgage Company or Landlord
<input type="checkbox"/>	Safe Deposit Box	<input type="checkbox"/>	HELOC
<input type="checkbox"/>	Small Business Account(s)		
<input type="checkbox"/>	Credit Card:	_____	_____
<input type="checkbox"/>	Credit Card:	_____	_____
<input type="checkbox"/>	Credit Card:	_____	_____
<input type="checkbox"/>	Store Charge Account:	_____	_____
<input type="checkbox"/>	Store Charge Account:	_____	_____
<input type="checkbox"/>	Store Charge Account:	_____	_____

Investments

Be sure to cover all your investment accounts including your retirement accounts, 401, IRA's, 529, etc..

<input type="checkbox"/>	Account:	_____
<input type="checkbox"/>	Account:	_____
<input type="checkbox"/>	Account:	_____
<input type="checkbox"/>	Account:	_____

Work

First, tell your boss, then reception and immediate co-workers, may want to change your name in the directory. Ask to have your email changed and have the old email account forwarded to the new one.

Payroll
 Human Resources

Have your confirmation of changes to your banking info for direct deposit accounts.

Professional Organizations
 Professional License
 Customer/Clients/ Suppliers/ Vendors

A brief blanket email or letter with new name & email, for internal and external contacts. Send email TO you or your boss, then BCC everyone on your list - they don't need to know who everyone else is.

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School(s)

If you are the student, you want to make sure that all your records match. Your social security number should be what keeps everything together, but double check that nothing slips through the cracks.

If you have kids in school, let the teachers know if they are little kids. It is especially confusing for those old enough to know about the change, but too young to understand that it does not affect them. Make sure that emergency contacts, etc. are updated.

- Teacher(s)
- Administration/ Front Office
- Financial Aid

Insurance

- Health Insurance
- Dental Insurance
- Auto Insurance
- Extended Warranty
- Home/ Renter's Insurance

Utilities

- Electric
- Gas
- Water
- Cable
- Exterminator
- Phone
- Cell Phone
- Internet
- Home Security System

Legal Papers

- Incorporation, LLC or other business documents
- Will, including Living Will
- Trusts
- Registrations/ Certifications

The Feds:

- Post Office

This really belongs closer to the top of the list - do it ASAP. Leaving a note for your mail carrier goes a long way in avoiding many hassles. Also attach a note to the inside of your mailbox with your old and your new name in case your carrier changes or goes on vacation.

- Passport

Generally we don't change our children's names, so if you are travelling overseas we highly recommend that you bring not only their passport, but their birth certificate and a copy of the Order that changes your name. Nothing can kill a vacation buzz like an angry 12-year-old outburst of "you're not my mom!" in airport security.

- Internal Revenue Service

File in the name you worked under. If you change in the middle of a tax year, use your new name as your forms are primarily identified by your SSN. You want any refunds issued in your new name.

Doctors

Send the emails to those that you can, otherwise call or you can wait until you have an appt. Make sure when you go in that they have the new info to match your insurance records to make sure claims are paid without hitches. If you have monthly prescriptions make sure your coordinate with the pharmacist when that is called in.

Other Services

As you go about your daily life let providers know as you contact them just to avoid any future confusion especially if you don't always have personal contact with the same person.

- Pharmacy

important for copay by insurance!

- Landscaping/ Maintenance
- Housekeeper/ Service
- Homeowner's Association
- Vet
- Pool Service
- Tutors/ Lessons
- Clubs, Associations
- Subscriptions