

Have you experienced a “Life Change”?

If you have recently gotten married, divorced, had a baby, lost a loved one, then there are a few things you need to change.

Marriage/Divorce/Addition to the family

Consider updating the following:

- Name and/or address change. **We will need a copy of marriage license and social security card bearing new name. In case of divorce a copy of the divorce decree (with seal).**
- Add /delete your spouse or new bundle of joy to your health insurance. **We will need a copy of marriage license and copies of birth certificate and social security card of spouse/child will be required. In case of divorce a copy of the divorce decree (with seal). THIS MUST BE DONE WITHIN 30 DAYS of EFFECTIVE DATE (i.e. marriage date, date of birth)**
- W2 to change your “marital status” and dependents
- You may also want to change your beneficiary on your retirement accounts. We have forms in our office for State plans. If you have TIAA you will have to contact them directly.
- If you have AFLAC insurances you will need to contact Gina Hillman 845-457-3924 or (gina_hillman@us.aflac.com) to make changes.
- If you are changing your name, you will be given a new email address with the new name. We will coordinate this with IT and you should expect a slight disruption in email service until completed.
- Update your Emergency Contact information

Loss of a loved one

If you recently have lost someone important to you (spouse, child, parent) you may wish to update the following:

- W2 to change your “marital status or dependents
- Beneficiary on your retirement plan
- Update your health insurance plans (this could potentially result in a change in coverage from Family to Single)