



ELLIOT GLASS
ELLIOT GLASS CONSULTING, LLC

Getting Married?

6 Financial & Tax Conversations to Have Before You Say "I Do"



1

Filing Status



Will you file jointly or separately?
It can lower taxes... or increase them.

2

Income & Withholding



Two paychecks can mean too much (or too little) withheld. Review your W-4s.

3

Insurance & Benefits



Review health coverage, life insurance, and employer benefits as a team.

4

Beneficiaries & Accounts



Update beneficiaries on retirement accounts, insurance policies, and bank accounts.

5

Retirement Goals



Align on saving, investing, and retirement timelines. A plan today = less stress tomorrow.

6

Shared Goals & Budget



Talk about debt, spending habits, and big goals. Build a plan that works for both of you.



A strong marriage is built on more than love — it's built on communication, trust, and a shared financial plan.



ELLIOT GLASS
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Guidance Built Around You.
Solutions Built for What's Next.



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