

## “HOW TO” “WHO” ”WHERE” CHECKLIST FOR NAME/ADDRESS CHANGE OVER

### **SOCIAL SECURITY CARD.....**

Make sure your Social Security record shows your correct name - the legal name you use. This is particularly important if you are employed because your employer reports your earning under the name you give them.

Whenever you change the name you use in employment - whether because of marriage or any other reason - you should report the change to Social Security. Otherwise your earnings won't be properly recorded and you may not receive all the Social Security credit due you for your work. Even if you don't work, you should report any name change to Social Security so your record will show the same name as you use on your tax returns.

To report a name change, contact your local Social Security office and complete an Application for Social Security Number Card. You will have to present proof of identity under both your former name and your new name. Almost any document such as drivers license, credit card, insurance policy, etc. will be sufficient proof of identity under your former name. Your marriage certificate is proof of your new name. All documents will be returned to you. For more information call the Social Security office listed in your local telephone directory.

**CHECKING/SAVINGS ACCOUNTS:** Bank, Savings & Loan, Credit Union.

**DRIVER'S LICENSE:** Bureau of Motor Vehicles License Branch. You will need your valid Driver's License and your Marriage Certificate.

**AUTOREGISTRATION & TITLE:** Bureau of Motor Vehicles -Automobile License Branch. Take your car Title, Registration, and all Automobile Insurance information, and Marriage Certificate.

**CREDIT CARDS/CHARGE ACCOUNTS:** Individual accounts, or stores - Business Office

**INSURANCE POLICIES/CHANGE BENEFICIARIES:** Insurance Company or your Agent

**ADD SPOUSE TO HOSPITALIZATION INSURANCE:** Insurance Company or your Employer

**INCOME TAX FORMS:** Form W-4 - your Employer - as soon as possible

**VOTER REGISTRATION:** County Clerk's Office, in the County of your residence, at least 30 days prior to the Election Day if moving from one precinct to another. If moving from one county or State to another, you must be a resident for 60 days.

WILLS: Lawyer  
LEASES: Landlord

SCHOOL RECORDS: Individual schools  
MEDICAL RECORDS: Family Doctor and/or  
Specialist-Dentist

**PASSPORTS:** The New Albany Post Office or downtown Louisville Post Office.

**MAGAZINE SUBSCRIPTIONS:** Individual publications

**STOCKS & BONDS:** Stockbroker or Bank

**SAFETY DEPOSIT BOXES:** Bank

**STATIONERY:** Printer or Stationer

**CHECKLIST FOR NAME/ADDRESS CHANGE OVER.....**

Have you thought about the changes in name, address and related information that are required for the following items once you marry?

- |  |  |
|--|--|
| <input type="checkbox"/> Checking accounts             | <input type="checkbox"/> Social Security records |
| <input type="checkbox"/> Savings accounts              | <input type="checkbox"/> Voter registration      |
| <input type="checkbox"/> Auto registration & title     | <input type="checkbox"/> Wills                   |
| <input type="checkbox"/> Driver's license              | <input type="checkbox"/> Leases                  |
| <input type="checkbox"/> Credit cards                  | <input type="checkbox"/> Income tax forms        |
| <input type="checkbox"/> Charge accounts               | <input type="checkbox"/> School records          |
| <input type="checkbox"/> Safe deposit boxes            | <input type="checkbox"/> Magazine subscriptions  |
| <input type="checkbox"/> Insurance policies            | <input type="checkbox"/> Medical records         |
| <input type="checkbox"/> Change beneficiaries          | <input type="checkbox"/> Passports & stationery  |
| <input type="checkbox"/> Add spouse to hospitalization | <input type="checkbox"/> Stocks & Bonds          |