

Name Change Checklist

Checklist · 25 items · 10 sections

Changing your name legally is just the first step: then comes the process of updating it everywhere it matters. This name change checklist covers every institution and account you need to notify, in the recommended order for a smooth process.

Open the editable, AI-powered version online:

<https://genechecklist.com/checklist/name-change-checklist>

STEP 1: LEGAL DOCUMENTS

- Obtain certified copies of your legal name change document (marriage certificate, court order, or divorce decree)

HIGH

Get at least 10 certified copies: many agencies require original certified copies, not photocopies

STEP 2: GOVERNMENT ID (DO THIS FIRST)

- Update Social Security card: visit SSA.gov or local SSA office with documentation

HIGH

Do Social Security first: many other agencies require updated SS card

- Update driver's license at DMV: bring SS card, legal name change document, and current license

HIGH

- Update US passport: submit Form DS-82 (or DS-11 if changing significant details)

HIGH

- Update voter registration at vote.gov

GOVERNMENT

- Update vehicle registration and car title

HIGH

- Notify IRS: update via tax return or Form 8822

HIGH

FINANCIAL

- Update all bank accounts and credit unions

HIGH

- Update all credit cards

HIGH

- Update investment and retirement accounts (401k, IRA, brokerage)

HIGH

- Update loan documents: mortgage, car loan, student loans

HIGH

EMPLOYMENT

- Notify HR/employer: update payroll, W-2, and employee records

HIGH

- Update professional licenses and certifications

HIGH

- Update LinkedIn and professional email signature

INSURANCE

- Update health insurance

HIGH

- Update auto, home, and life insurance policies

HIGH

LEGAL

- Update will, trust, and beneficiary designations

HIGH

- Update power of attorney documents

HEALTHCARE

- Update primary care doctor, dentist, and all medical providers

HIGH

- Update pharmacy for prescription records

HIGH

ONLINE ACCOUNTS

- Update email address if desired

- Update social media accounts: Facebook, Instagram, Twitter/X

- Update Amazon, Google, Apple, and major online accounts

TRAVEL

- Update frequent flyer and loyalty program accounts

- Update Global Entry or TSA PreCheck if you have it