

## Life Event Planning Checklist

### Moving / Relocating

- Update Budget Based on New Cost of Living Adjustments
- Review Financial Situation (Change of Income, Expenses, etc)
- If Moving States, Review Tax Situation Based on New State's Tax Rules
- Review Estate Plan to Make Sure Documents Still Accomplish Goals in New State
- Update Retirement Projections Based on New Living Situation
- Work with Accountant to Maximize Tax Break
- Review all of these items with your financial advisor



*Securities offered through Cetera Advisor Networks LLC, Member FINRA/SIPC. Investment advisory services offered through CWM, LLC, an SEC Registered Investment Advisor. Cetera Advisor Networks LLC is under separate ownership from any other named entity.*