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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