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## Life Event Planning Checklist

### Buying a Home

- Analyze How Much You Can Afford
- Review Mortgage Options and Rates
- Create New Projections with Updated Cash Flow Costs to Make Sure Plan is Still on Track
- Take a Look at Balance Sheet and Update with New Home Purchase
- Review Life Insurance
- Review Tax Situation with CPA
- Does Buying Home Change Estate Plan?
- Review all of these items with your financial advisor



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