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## Life Event Planning Checklist

### Switching Jobs

- Review Health Insurance and Benefits
- Rollover Your 401(k) to an IRA
- If There Is 401(k) After Tax Dollars, Rollover to Roth IRA
- Review NUA Rules if Employer Stock is in Plan
- Make Changes to Retirement Projections
- Update Cash Flow Analysis
- If Relocating for Work, Analyze Cost of Living Changes
- Create a New Budget
- Review New 401(k) and Benefits
- Review all of these items with your financial advisor



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