



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

