



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 Situations with CPA
- Does Buying a Home Change Estate Plan?
- Review all of these items with your financial advisor

