



Life Event Planning Checklist

Switching Jobs

- Review Health Insurance
- 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)
- Review all of these items with your financial advisor

