

Life Event Planning: Moving/Relocating Financial Checklist



- 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

While this check list can start as a guide, speaking to us is the best way to get your 2019 financial life in order. Reach out to us today!

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