

Celebrating Over 30 Years...

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...and Supporting You for the Next 30

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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 these items with your financial advisor