

# 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 Situation with CPA
- ✓ Does Buying Home Change Estate Plan?
- ✓ Review all of these items with your financial advisor



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