

# 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 of these items with your financial advisor



Office: 724.720.9317  
Mobile: 412.585.4553  
[www.mmmadvisory.com](http://www.mmmadvisory.com)

2009 Mackenzie Way, Suite 100  
Cranberry Township, PA 16066