

Life Event Planning Checklist

Switching Jobs

- ✓ Review Health Insurance and Benefits
- ✓ 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



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