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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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