

NAME _____

JOB CHANGER CHECKLIST

Are You Financially Prepared?



GOALS ALIGNMENT

YES NO N/A

- | | | | |
|--------------------------|--------------------------|--------------------------|---|
| ☐ | ☐ | ☐ | Written career goals |
| ☐ | ☐ | ☐ | Spousal and inner circle support |
| ☐ | ☐ | ☐ | Named the what-ifs and challenges of my new opportunity |
| ☐ | ☐ | ☐ | Ranked the most important aspects of my next job |

FINANCIAL RESOURCES

YES NO N/A

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| ☐ | ☐ | ☐ | Impact on savings and short-term reserves |
| ☐ | ☐ | ☐ | Current and future retirement projections |
| ☐ | ☐ | ☐ | Created a current balance sheet and budget |
| ☐ | ☐ | ☐ | Gathered all my current employer statements (ex: 401K, pension, ESOP, etc) |
| ☐ | ☐ | ☐ | Decided how to manage my employer plans (vesting, tax implications, investment selection, self-managed vs. guided) |

BENEFITS ANALYSIS

YES NO N/A

- | | | | |
|--------------------------|--------------------------|--------------------------|--|
| ☐ | ☐ | ☐ | Evaluated health insurance options (e.g., COBRA vs. employer and individual options, HSAs) |
| ☐ | ☐ | ☐ | Created a plan for replacing the benefits I may lose (e.g., PTO, Disability, Life, Long-Term Care Insurance) |
| ☐ | ☐ | ☐ | Identified unique opportunities my change of job and/or income provides (e.g., Roth conversions, 401K NUA, and capital gains strategy) |
| ☐ | ☐ | ☐ | Created a tax-efficient strategy for my ESOP, stock purchase, and/or stock option plan at my current and future employer |
| ☐ | ☐ | ☐ | Reviewed my employer contract and any restrictive covenants with legal counsel |

COMMENTS/QUESTIONS _____



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