## **Celebrating Over 30 Years...**

J. Charles Dunham CFP®, CRPC® Comprehensive Wealth Planner

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...and Supporting You for the Next 30

John "Goose" Dunham Comprehensive Wealth Planner

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## **Life Event Planning Checklist: Buying a Home**

Ana	llyze how much you can afford
O Rev	iew mortgage options and rates
O Crea	ate new projections with updated cash flow costs to make sure plan is still on
track	
O Tak	e a look at balance sheet and update with new home purchase
O Rev	iew life insurance
O Rev	iew tax situation with CPA
O Doe	es buying home change estate plan?
O Rev	iew all of these items with your financial advisor

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