

Celebrating Over 30 Years...

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...and Supporting You for the Next 30

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Life Event Planning Checklist: Buying a Home

- Analyze how much you can afford
- Review mortgage options and rates
- Create new projections with updated cash flow costs to make sure plan is still on track
- Take a look at balance sheet and update with new home purchase
- Review life insurance
- Review tax situation with CPA
- Does buying home change estate plan?
- Review all of these items with your financial advisor