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: Moving/ Relocating

\bigcup	Update budget based on new cost of living adjustments
\bigcirc	Review financial situation (change of income, expenses, etc.)
\bigcirc	If moving states, review tax situation based on new state's tax rules
\bigcirc	Review estate plan to make sure documents still accomplish goals in new state
\bigcirc	Update retirement projections based on new living situation
\bigcirc	Work with accountant to maximize tax break
\bigcirc	Review all these items with your financial advisor

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