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: Switching Jobs

) Review health insurance and benefits
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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