

## Changing Jobs Checklist

<b>General Information</b>	Yes	No	N/A
1. Has relevant personal information been gathered? <ul style="list-style-type: none"> <li>• Names, ages</li> <li>• Children and other dependents</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has financial situation been assessed? <ul style="list-style-type: none"> <li>• Income</li> <li>• Expenses</li> <li>• Assets</li> <li>• Liabilities</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Employee Benefits</b>	Yes	No	N/A
1. If yes, are there restrictions or a waiting period for all benefits?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is health insurance offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Are short- and long-term disability offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is a Section 125 or flexible spending account offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Is dental insurance offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is vision insurance offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Is life insurance offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Is a retirement plan offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Is adoption assistance offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Is long-term care insurance offered?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Other insurance?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
12. Has vacation/time off been reviewed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			

<b>Financial Picture</b>			
	<b>Yes</b>	<b>No</b>	<b>N/A</b>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
1. If there are children, will day care be necessary?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Will living expenses be affected?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Money Management</b>			
	<b>Yes</b>	<b>No</b>	<b>N/A</b>
<ul style="list-style-type: none"> <li>• Housing costs</li> <li>• Transportation costs</li> <li>• Food, clothing, and other household expenses</li> <li>• Health-care expenses</li> <li>• Life and disability insurance premiums</li> <li>• Child-care costs</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Housing Situation</b>			
	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is relocation an issue?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is there a home that needs to be sold?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Is a home purchase planned?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Have the advantages and disadvantages of buying a home versus renting a home been discussed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Have other expenses been reviewed? <ul style="list-style-type: none"> <li>• Mortgage origination fees</li> <li>• Real estate agent fees</li> <li>• Attorney fees</li> <li>• Moving expenses</li> <li>• Potential increase in real estate taxes</li> <li>• Cost of living in new location</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Will the new employer pay all relocation expenses?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Insurance Planning</b>			
	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Is a current health insurance plan in place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has spouse's coverage been evaluated?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Will COBRA be needed during the job transition period?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Is an individual (non-employer-sponsored) life insurance policy in place?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Does life insurance need to be upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Does automobile insurance need to be purchased/upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Does homeowners/renters insurance need to be purchased/upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Does disability income insurance need to be purchased/upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Does personal liability insurance need to be purchased/upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
10. Does long-term care insurance need to be purchased/upgraded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11. Are beneficiary designations up-to-date?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Investment Planning</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
1. Has liquidity need changed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Has risk tolerance been determined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Have investment goals been considered/prioritized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Has size/frequency of investments been determined?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Has current asset allocation been reviewed? <ul style="list-style-type: none"> <li>• Stocks</li> <li>• Bonds</li> <li>• Mutual funds</li> <li>• Annuities</li> <li>• Real estate</li> <li>• Art/collectibles</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Will job change affect existing employee stock options?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Retirement Planning</b>	<b>Yes</b>	<b>No</b>	<b>N/A</b>
<ul style="list-style-type: none"> <li>• Employer-sponsored retirement plan</li> <li>• Beneficiary designation updated</li> </ul>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. If a 401(k) is offered, will the employer match employee contributions?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

3. Are IRAs being effectively utilized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Will all available plans be funded?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			
<b>Tax planning</b>	Yes	No	N/A
1. Will withholding change?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Is the maximum tax advantage of employee benefits realized?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. Will childcare be needed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. Will there be a home office?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Have home office deductions been discussed?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Is there self-employment income?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Notes:			