



# JOB CHANGE CHECKLIST

## **New Job?**

A new job is exciting but it can affect your financial needs and strategies. Please reference this list for potential to-do items in the event of a job change.

### **Talk to your financial professional about:**

- Revising your comprehensive financial plan to account for any income or benefit changes
- Setting up an account to receive new or rollover assets
- The potential need to set up or change investment allocations
- Determine the appropriate amount of contributions under your employer's compensation plan
- The need for private long term disability income insurance
- Your life insurance needs

### **Additional action items:**

- Talk to a professional about any tax implications or changes due to your change in employment
- Update your contact information and address on all accounts and policies held by your previous employer
- Notify your accountant or IRS of your change in employment