

NAME _____

CAREER CHANGER CHECKLIST

Are You Financially Prepared?



GOALS ALIGNMENT

YES NO N/A

- Written career goals
- Spousal and inner circle support
- Named the what-ifs and challenges of my new opportunity
- Ranked the most important aspects of my next job

FINANCIAL RESOURCES

YES NO N/A

- Measured short-term reserves
- Current retirement projections
- Written a current balance sheet and budget
- Categorized assets into available, emergency, and off-limits
- Created a tax-efficient spending plan for my available assets
- Gathered all my current employer statements (ex: 401K, pension, ESOP, etc)
- Decided how to manage my employer plans (vesting, tax implications, investment selection, self-managed vs. guided)

BENEFITS ANALYSIS

YES NO N/A

- Evaluated health insurance options (e.g., COBRA vs. employer and individual options, HSAs)
- Created a plan for replacing the benefits I may lose (e.g., PTO, Disability, Life, Long-Term Care Insurance)
- Identified unique opportunities my change of income provides (e.g., Roth conversions, 401K NUA, and capital gains strategy)
- Created a strategy for my ESOP and/or SPP plan
- Reviewed my employer contract and any restrictive covenants with legal counsel

COMMENTS/QUESTIONS _____



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