Life Event Planning Checklist: Buying a Home

DAVIS WILLIAMS
Wealth Management

- [ ] 1. Analyze How Much You Can Afford
- [ ] 2. Review Mortgage Options and Rates
- [ ] 3. Create New Projections with Updated Cash Flow Costs to Make Sure Your Financial Plan is Still on Track
- [ ] 4. Take a Look at Your Balance Sheet and Update with New Home Purchase
- [ ] 5. Review Life Insurance
- [ ] 6. Review Tax Situation with CPA
- [ ] 7. Does Buying Home Change Estate Plan?
- [ ] 8. Review All of These Items with Your Financial Advisor

Davis Williams Wealth Management
8832 Blakeney Professional Dr, Suite 200 ▪ Charlotte, NC 28277
Office: 704-542-0628 ▪ Fax: 704-544-7075 ▪ daviswilliams.com