

# Life Event Planning Checklist: Buying a Home



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

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