



Wealth is the ability to fully experience life.

## Job Change

It's important to be aware of the financial implications of changing jobs and how you can best prepare for this transition. You'll want to carefully evaluate the value of benefits and perks beyond your salary. This checklist can help you make informed decisions to help position you to meet your future career and retirement goals.

### CURRENT JOB BENEFITS REVIEW

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- |  |   |
|--|---|
| <input type="checkbox"/> 401K matching/vesting   | <input type="checkbox"/> Disability insurance                                     |
| <input type="checkbox"/> Profit sharing  | <input type="checkbox"/> Dental insurance <i>(check status of pending claims)</i> |
| <input type="checkbox"/> Stock options/purchase plans <i>(check past performance of stock)</i> | <input type="checkbox"/> Vision insurance <i>(check status of pending claims)</i> |
| <input type="checkbox"/> Vesting requirements  | <input type="checkbox"/> Long-term care insurance                                 |
| <input type="checkbox"/> Health Sharing Account (HSA) or Flexible Sharing Account (FSA)        | <input type="checkbox"/> Paid time off  |
| <input type="checkbox"/> Health insurance <i>(check status of pending claims)</i>              | <input type="checkbox"/> Daycare  |
| <input type="checkbox"/> Life insurance  | <input type="checkbox"/> Change of address information                            |

### NEW JOB FACTORS TO CONSIDER

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|--|--|
| <input type="checkbox"/> Compensation (benefits, bonus, overtime opportunities, PTO) | <input type="checkbox"/> Home office/auto reimbursement                            |
| <input type="checkbox"/> 401K decisions  | <input type="checkbox"/> Relocation package  |
| <input type="checkbox"/> New company disaster/succession plan                        | <input type="checkbox"/> Budget planning   |
| <input type="checkbox"/> Long-term outlook for new company vs. current employer      | <input type="checkbox"/> Income tax situation <i>(if large salary increase)</i>    |
| <input type="checkbox"/> Long-term career development/promotions                     | <input type="checkbox"/> Licensing, continuing education, professional memberships |
| <input type="checkbox"/> Work-life balance and flexibility                           | <input type="checkbox"/> Commute, parking, and travel requirements                 |

### RESOURCES

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- [KenColeman.com](http://KenColeman.com)

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