



Job change questions for your financial professional

Making a big change in your life triggers some big questions. A financial professional can help you work through the answers.

Print this list and have it handy when you're ready to start the conversation.

- Does a new job change my expected retirement date?
- Which employee benefits will have the biggest impact on my finances?
- How should I evaluate the investment options in my new retirement plan?
- How do the expenses of my previous employer's plan compare with the new one?

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- How should I decide which health plan is right for my family?
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- How much should I put aside in flexible spending accounts?
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- What type of individual retirement account (IRA) is right for my situation?
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- What are the tax implications of cashing out my 401(k)?
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- How much should I save in my emergency fund?

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