



Career change checklist

The good thing about following your passion in a new career at midlife: Your wisdom and experience give you an advantage. You know enough to control the things you can during your transition from your old job to the job of your dreams.

Print our checklist and keep it handy. It can help you stay on track.

Network.

Send coffee invites to anyone who may be a good contact and has followed their own passion – or knows someone who did. Their stories may help you on your own path.

Start training.

Give yourself a crash course of relevant skills for your new career. Try online courses like [Coursera.com](https://www.coursera.com) or [LinkedIn Learning](https://www.linkedin.com/learning), or classes offered in your area.

Get on budget.

If you're taking a pay cut to follow your dreams, a budget worksheet can help you identify areas where you can cut back.

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Pay attention to benefits.

If you're giving up benefits, [research independent coverage](#) for yourself and your family.

Use your FSA.

Before you leave your old job, make sure you use up your [FSA \(flexible spending account\)](#). If you leave a balance, you won't be able to use those funds.

Take care of your 401 (k).

If you had a 401 (k) plan with your previous employer, you need to [decide what to do with that money](#).

Keep your portfolio balanced.

You may want to update or rebalance your portfolio allocations. Talk to your financial professional about the best next steps.

Know your beneficiaries.

If you need to fill out new paperwork, you may need to name beneficiaries. Have Social Security numbers handy.

Build your team.

You're not in it alone. Make sure you've got the right [team of professionals](#) to help you create the life that you want.

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