

Financial Planning Process

RELOCATION QUESTIONNAIRE

Date _____

What state are you considering for relocation?	
Relocation state's Income Tax	_____ %
HOW WILL THE MOVE AFFECT COST OF LIVING?	
Utilities	\$ _____
Transportation	\$ _____
Rent/Mortgage	\$ _____
State Sales Tax <i>(affects cost of all purchased goods)</i>	_____ %
Relocation State Estate Tax	_____ %
Does the relocation state require an update for Estate Planning documents?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are lifetime giving strategies needed to offset State Estate Tax?	<input type="checkbox"/> Yes <input type="checkbox"/> No
RECOMMENDATIONS AND OBSERVATIONS	