

RELOCATION QUESTIONNAIRE ANALYSIS



Prepared For: _____

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 (affects cost of all purchased goods)	\$		
Relocation State Estate Tax	\$		
Does the relocation state require an update for Estate Planning documents?	Yes	No	
Are lifetime giving strategies needed to offset State Estate Tax?	Yes	No	

Recommendations And Observations

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