



Financial Audit Checklist

With thoughtful planning, your move does not have to feel overwhelming. This checklist provides you with things to consider as you begin auditing your assets.

During a time of transition, you will want to make informed decisions regarding your financial affairs. It is a good time to gather your records to understand what you own and why you own it. Use your current resources to educate yourself and prepare for this exciting new chapter in your life:

- Visit your financial advisor
- Attend financial seminars
- Talk to your accountant about tax breaks for seniors
- Ask your community about their planning resources

Financial Audit Checklist

Evaluate Your Insurance Plans

- ☐ Life insurance
- ☐ Long-term care insurance
- ☐ Home insurance
- ☐ Car insurance
- ☐ Health insurance

Review Your Beneficiaries

- ☐ Life insurance policies
- ☐ Annuities
- ☐ 401(k)s, IRAs
- ☐ CDs and bank accounts
- ☐ Brokerage accounts

Write a Will

- ☐ Asset distribution
- ☐ Executor of your estate
- ☐ Laws vary by state - review with an attorney
- ☐ Special last wishes

Explore Your Options

- ☐ Veterans benefits
- ☐ Pensions
- ☐ Tax savings
- ☐ Community options
- ☐ Living trusts

About Us

Senior communities nationwide trust Moving Station to help future residents sell their homes and relocate with ease. Since 1995, our home sale and relocation solutions have supported 40,000 successful senior relocations.

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