

NEW JOB

checklist



In your quest to begin a new job, please review the following important financial tips:

- Contact your HR department to fully understand, and if needed, enroll in employee benefits of the new job (i.e. disability, life, health, long-term care insurance, retirement benefits).
- Contact your old HR department to fully understand what termination benefits are provided.
- Withhold the proper amount for taxes, benefits, and retirement savings.
- Update your resume.
- Meet with your financial advisor to discuss your old employer sponsored qualified plan and equity compensation (i.e. stock options, restricted units, etc).
- Understand your new paycheck frequency and schedule; coordinate your monthly budget to coincide.
- Update your social media sites or any other public forums detailing your job status (i.e. LinkedIn).
- Understand starting dates of your benefits, along with vesting schedules.
- If applicable, request a pension estimate from previous employer.
- Upon termination from your old employer, consider your spouse's benefits as well. This may open an off cycle open enrollment (i.e. life changing events).