

RELOCATION ANALYSIS



LEVEL FOUR
Financial
A DIVISION OF
LEVEL FOUR GROUP, LLC

Prepared For: _____

Date: _____

DESTINATION DETAILS

Where will you be relocating to?	
When do you intend to relocate?	
Destination State Income Tax Rate	%

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

866.834.1040 | WWW.LEVELFOURFINANCIAL.COM

Securities offered through Level Four Financial, LLC Member FINRA/SIPC. Advisory services offered through Level Four Advisory Services, LLC, an SEC-registered investment adviser. Insurance services offered through Level Four Insurance Agency, LLC. Level Four Financial, LLC, Level Four Advisory Services, LLC, and Level Four Insurance Agency, LLC are independent entities. Level Four Group, LLC is a division of CRI Capital Group, LLC, a subsidiary of CRI Advisors, LLC. "CRI" is the brand name under which Carr, Riggs & Ingram, L.L.C. ("CPA Firm") and CRI Advisors, LLC ("Advisors") and its subsidiary entities provide professional services. CPA Firm and Advisors (and its subsidiary entities) practice as an alternative practice structure in accordance with the AICPA Code of Professional Conduct and applicable law, regulations and professional standards. CPA Firm is a licensed independent CPA firm that provides attest services to its clients, and Advisors and its subsidiary entities provide tax and business consulting services to their clients. Advisors and its subsidiary entities are not licensed CPA firms.