

3 Tips For Every New Homeowner

1. Update Your Address

- Complete the United States Post Office change of address form (online or in-person) to make sure your mail is forwarded.
- Complete Form 8822 for the Internal Revenue Service to make sure you receive all federal tax notices.
- Contact local state tax agency to make sure you receive all state tax notices.
- Contact your attorney, accountant, financial advisor, and other service providers.



2. Make Sure House Title Coordinates with Your Estate Plan

- If your previous plan had specific provisions for your old property, make sure it is updated since you no longer own that property.
- If your estate plan includes a trust, make sure your new home is titled in the name of the trust.



3. Check Your Life Insurance and Beneficiary Designations

- Make sure your life insurance policy is enough to cover the new expense of your home in the event of your passing.
- Make sure beneficiary designations match your estate plan so that you do not inadvertently disinherit a family member.

Life Insurance

Beneficiary _____

Contingent Beneficiary _____