

CHECKLIST

Do You Need to Update Your Estate Plan?

Here is a check list of some things to consider this year as you review your estate plan. If you answer yes to any of these questions, you may consider setting an appointment with us.

- Increase or decrease in your assets
- Receive an inheritance
- Wedding, divorce, break up
- Loss of a loved one
- Birth or adoption of a child or grandchild
- Children have grown up
- Loss of your executor, guardians, trustees, etc.
- Desire to change your executor, guardians, trustees, etc.
- Desire to provide for a charitable or other organization
- Started a business
- Sold a business
- Desire to change your heirs or beneficiaries
- Bought or sold a home or other real property
- Moved out of state
- Need to care or provide for a loved one with a mental health issue, disorder, or developmental disability
- Need to pay for nursing home
- It has been three years or more since you have reviewed your estate plan

Did you answer yes to any of these questions?

If so, it is time to set up your free consultation with us today.

