

IS YOUR ESTATE PLAN OUT-OF-DATE?

Review the questions below to see if it is time for an Estate Plan review

1. Has it been more than 3 years since you reviewed your current estate plan?
2. If you have a Trust, are there any assets that you have not transferred into your Trust?
3. Has the value of your assets changed since you signed your estate planning documents?
4. Have you added or changed the type of assets you own since your estate planning documents were signed?
5. Have you bought or sold a house or other piece of property since your estate planning documents were signed?
6. Are you contemplating selling any stock or other valuable assets with a low cost basis?
7. Is there any personal property that you would like distributed that have not been clearly set forth in your planning documents, including the care of any surviving pets?
8. Are there any gifts you would like to make to charities at your death that have not been clearly set forth in your estate planning documents?
9. Have you, your spouse or a child become physically or mentally incapacitated since your estate planning documents were signed?
10. If you become disabled, is your financial Power of Attorney older than 3 years?
11. If you become disabled, is your health care Power of Attorney older than 3 years?
12. If you have a Living Trust, are Medicaid triggers in place to ensure that at the appropriate time Medicaid planning can be implemented?
13. Have you recently been married, divorced or widowed since your estate planning documents were signed?
14. Have any of your children been married, divorced or died since your estate planning documents were signed?
15. Since creating your estate plan, are your children now adults?
16. If you have minor children or children with special needs, does your estate plan name Guardians for them?
17. Have you had children since your estate planning documents were signed?
18. Have your children had children?
19. Have you moved between states since your estate planning documents were signed?
20. Since you signed your estate planning documents have you changed your mind about any aspect of the plan?

If you have said "YES" to any of these questions, it would be a good idea to schedule a free Estate Plan review appointment.

**To schedule your free Estate Plan review
call 602.371.8898 today!**

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