

THE IMPORTANCE OF YOUR ESTATE PLAN REVIEW



Have you refinanced or purchased new assets?



It's very important that the assets within your estate are properly titled in the Trust name. If you have recently refinanced your existing property or purchased additional real estate, it's important to ensure the properties are titled in the trust.

Have your desires changed?

You want to ensure that your successor Trustees and Alternates are still your first choice should someone need to take over your trust. Review designations to make sure that all of your beneficiaries are still your desired choice.

Situations change. Laws change. Has your family grown in size? You may have decided to make revisions to the language in your trust. It's far better to make these changes ahead of time to avoid expensive litigation.

Do your Financial or Medical Powers of Attorney designations need to be updated?



How often?



We recommend that no less than every two years you review your estate planning documents and make any necessary changes. Do you have questions? Please give our office a call. We're here to help.

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