



20 RED FLAGS THAT SIGNAL WHEN YOUR ESTATE PLAN IS OUT OF DATE

By

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We offer clients the opportunity to sit down with us and review their estate plans at least once each year. However, this doesn't mean you should wait until your next review if your circumstances change. This **Estate Planning Checklist** identifies events that could make a significant impact on your estate. If any of these events occurs, please call us. For your protection, we may need to amend or revise one or more of your estate planning documents.

Changes Involving You or Your Spouse

1. You get married.
2. You and your spouse divorce.
3. Your spouse dies or becomes incapacitated.
4. Your health changes.

Changes Involving Your Children, Grandchildren or Other Beneficiaries

5. You have a child.
6. You adopt a child.
7. Your child marries.
8. Your child divorces.
9. Your child becomes ill.
10. One of your beneficiaries experiences an economic or health change, good or bad.
11. One of your beneficiaries proves to be financially irresponsible.
12. One of your beneficiaries has a change in attitude toward you.

Changes in Your Economic Condition

13. The value of your assets increases or decreases.
14. Your insurability for life insurance changes.
15. Your employment changes.
16. Your business interests change, such as becoming involved in a new partnership or corporation.
17. You retire from your business or profession.

18. You acquire property in a different state.
19. You move to a different state.

Changes to a Person Named in Your Estate Plan

20. Something happens to a person named in your estate plan, such as the death or incapacity of your personal representative, executor, trustee, guardian or conservator.

You're Invited to Call or E-mail.

“If you have questions regarding any of our firm’s practice areas or attorneys, please don’t hesitate to call. We pride ourselves on being a small firm -- with the highest level of knowledge, skill, judgment and experience. And we’ll be pleased to help you in every way.”

-- Ralph Minto

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“Protecting What You Value”

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