WHEN TO REVIEW YOUR ESTATE PLANNING DOCUMENTS

It is recommended that you review your Will and estate plan annually or so, to be sure that it still reflects your circumstances and desires.

However, in addition to periodic review, the following events should trigger an immediate self-review of your estate planning documents, as such events are of the type likely to require changes:

1. Death or disability in the family,
2. Marriage of a family member,
3. Dissolution (divorce) or marital separation,
4. Birth or adoption,
5. A health problem or serious illness,
6. Significant increase or decrease in the value of your estate,
7. Significant increase or decrease in income or change in nature of income,
8. Change in the manner of asset ownership or business interests, such as incorporation or partnership formation,
9. Retirement or changes in employment,
10. Change in residence (state of domicile),
11. Life insurance purchase or change in insurability,
12. Desire to change Personal Representative, Trustee or Guardian,
13. Receipt of a significant inheritance gift and,
14. Changes in the law.

If any of the above listed events should occur in your situation, please review your estate planning documents and contact Three60 Law Group if you have any questions or would like new documents prepared.

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