

Call us today! (513) 721-1513

IS YOUR ESTATE PLAN OUTDATED?

1. Has it been more than 3 years since you reviewed your current estate plan?
2. If you have minor children, have you recently reviewed who you've selected as Guardians for them?
3. Since creating your estate plan, are your children now adults?
4. If you have a Trust, are there any assets that you have not transferred into your Trust?
5. If you become disabled, is your Power of Attorney document for financial decisions older than 5 years?
6. If you become disabled, is your Power of Attorney document for health care decisions older than 5 years?
7. Are there any gifts you would like to make to charities at your death that have not been clearly set forth in your planning documents?
8. 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?
9. Since you signed your planning documents, have you changed your mind about any aspect of the plan?
10. Has the value of your assets changed since you signed your planning documents?

11. Have you added or changed the kind of assets you own since your planning documents were signed?
12. Have you recently been married, divorced or widowed since your estate planning documents were signed?
13. Have you had children since your estate planning documents were signed?
14. Have your children had children?
15. Have any of your children been married, divorced or died since your planning documents were signed?
16. Have you, your spouse or child become physically or mentally incapacitated since your planning documents were signed?
17. Have you bought or sold a house or other piece of property since your planning documents were signed?
18. Are you contemplating selling stock or other valuable assets with a low cost basis?
19. Have you moved between states since your planning documents were signed?

If you have answered 'YES' to any of these questions, it's time to schedule an appointment.

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