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10 LIFE EVENTS THAT SHOULD TRIGGER A REVIEW OF YOUR ESTATE PLAN

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I know that reading your Will or Trust is not the most interesting reading material you have laying around your house. However, for your estate plan to work it is important that it changes as your life changes. No estate plan should ever be treated as a sign it and forget it document or stuffed in a draw never to be seen again. If you say “yes” to any of the life events listed below, make certain that you visit with a Charlotte, North Carolina estate planning attorney to make the appropriate changes.

Did you...

1. get married or remarried?
2. get divorced?
3. have more children?
4. add grandchildren to the family?
5. increase life insurance policies or add additional ones?
6. become an empty-nester?
7. Retire?
8. increase your assets significantly (through employment or inheritance for example);

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9. inherit assets?

10. have children who were married and now are divorced?

Of course, this is not a complete list, but a good starting point. If you have a plan and would like us to review it for you to make certain that it still reflects your wishes, call our Charlotte, North Carolina estate planning firm at 704-843-1446.