



15 LIFE CHANGES THAT SIGNAL WHEN YOUR ESTATE PLAN NEEDS MAINTENANCE

By: Sabrina Winters, Attorney at Law, PLLC

It is a good idea to have your estate plan reviewed every year or two to ensure your estate plan accurately reflects any changes in your family circumstances. The list below pinpoints certain events that could have a significant impact on your estate. Of course there are other events that could be added to the list.

1. You get married or divorced
2. Your spouse dies or becomes incapacitated
3. You become ill or disabled
4. You have a new child
5. Your child marries or divorces
6. Your child becomes ill or disabled
7. You have a new grandchild
8. One of your beneficiaries shows signs of financially irresponsible
9. One of your beneficiaries develops a drug or alcohol problem

15720 John J. Delaney Drive, Suite 300, Charlotte, North Carolina 28277

(704) 843-1446

swinters@sabrinawinterslaw.com * www.ncestateplanninginfo.com

10. The value of your assets has increased
11. Your employment changes
12. You retire from your business or profession
13. You acquire property in a different state
14. You move to a different state
15. There have been law changes that may affect the language of your documents