

If you can check “**yes**” to any of the following, a revision to your estate plan may be necessary:

- Marriage/divorce
- Addition of a child or grandchild
- Change in guardianship
- A child turning 18
- Illness or disability of spouse
- Death of a spouse
- Changes to state or federal laws
- Buying or selling a home or significant asset
- Retirement/pre-retirement
- Move to a different state
- Material change in medical situation or serious diagnosis
- Significant increase in net worth
- Change in investment advisor – double check beneficiary designations
- Change in health requiring assistance from others

Estate Plans should be reviewed by your attorney every three to five years whether or not you’ve been impacted by any of the above changes. How long has it been since your estate plan has been reviewed?