

Should I Update My Estate Plan?

By: Meghan A. McGrattan

Once your estate plan is established, it is important to revisit your plan periodically to ensure that it fits life's ever-changing course. Below is a list of events that should cause you to review and evaluate your estate plan.

1. Marriage or divorce
2. Birth of a child
3. Approaching retirement
4. Moving to a different state
5. Death of a family member
6. Change in assets
7. Illness or disability
8. Change in family dynamics and relationships

As life is unpredictable, it is important to periodically review your estate plan. An up-to-date plan can help ensure that your wishes are carried out and can prevent chaos for your family after your death.

If you have any questions or if you would like to make an appointment to update your estate plan, please contact the attorney in our office with whom you typically work or an attorney in our Estate Planning and Wealth Preservation Department.