

QUESTIONNAIRE: Is it Time to Review Your Estate Plan?

Certain major life events, or even less significant occurrences, can trigger the need to reevaluate your estate plan, make revisions to existing legal documents, or draft entirely new documents. The following checklist highlights some of those events. When any of the following events occur, consult your elder law or estate planning attorney to determine what changes may need to be made to ensure that all of your needs and those of your heirs are taken care of.

- Marriage
- Divorce
- Birth of a child
- Adoption of a child
- Birth of a grandchild
- Death of spouse
- Death in the family (or of other beneficiary)
- Desire to change beneficiaries
- Desire to retire at a younger age
- Intent to remain in the workforce additional years
- Decrease in income
- Increase in income
- Loss of job
- Change of job
- Retirement

- ___ Decrease in expenses
- ___ Increase in expenses
- ___ Stock market surge
- ___ Stock market crash
- ___ Sale of business
- ___ Sale of home
- ___ Sale of other property
- ___ Receipt of gift or inheritance
- ___ Change in tax laws