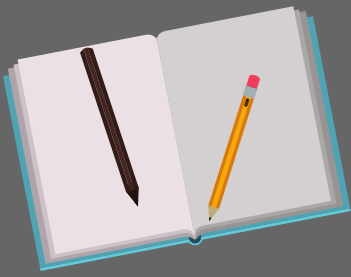


# Checklist for Updating Your Estate Plan



## The Basics

At a minimum, your Estate Plan should include a Will, Medical & Financial Powers of Attorney, and an Advance Care Directive.



## The Maintenance

**The older these documents are, the greater the risk that they don't address your current goals.**

**Creating your plan is important, but after creating one, it is essential to review and update it.**

TIP: It's a good idea to review your documents every 5 years.

## The Checklist

If you answer YES to any of these questions, then you might need to create or update your Estate Plan:



- Have you experienced a change in marital status?
- Are there any newly born or adopted children?
- Do you require special provisions for children?
- Has there been a change in the assets that make-up your estate?
- Has there been a change in your designated guardian, personal representatives or trustees?
- Has there been a change in the who, what, and when of the recipients of your assets?
- Are there any disabled or special needs children?
- Do you have a substantial change in the value of your estate?
- Has there been a change in your business interests?
- Have there been family loans or gifts to family members?

Whether you need Estate Planning documents created, updated, or reviewed, Sodoma Law's Estate Planning attorneys can help.

Visit [www.SodomaLaw.com](http://www.SodomaLaw.com) or call 704.442.0000.