

RESOLVE TO UPDATE YOUR ESTATE PLAN!

Lose 10 pounds! Volunteer more! Jog everyday!

Here is one improvement project you can complete in one or two sittings, that will deliver immediate peace of mind, and help your family as much as it helps you:

Update your Estate Plan

How long ago did you put your current plan into place? Do the provisions still meet your needs, and those of your loved ones? Do they leave a legacy that reflects your values?

Think of planning your estate as a low-key yet ongoing priority, rather than a “once-and-done” task. Here are a few life events that you may experience.

You marry, remarry or divorce;
You or your spouse retires;
Children or grandchildren are born;
You want to balance gifts to family with support of the charities you value.

It doesn't take long to see if your estate plan still benefits the individuals and causes that mean the most to you today.

Start by reading your will, reviewing the beneficiary designations of your retirement accounts and life insurance policies.

If you want to make changes, contact your lawyer, accountant or financial advisor. Your lawyer can update your will; your insurance broker or retirement administrator can update your beneficiary designations.

They are there to help - resolve to get it done!