

Life Events to Review Estate Plan

- Change in Status of Children
 - Birth, Adoption
 - Death, or Disownment
- Change in Marital Status
 - Marriage or Re-Married
 - Divorce
- Change in Health
 - Considerable changes in one's own health
 - Changes in a family member's health
- Changes in Financial Status
 - Increase or Decrease in Wealth
 - Estate considerations
 - Tax considerations
- Beneficiaries Status
 - Death
 - Mental Capacity
 - Competent Financial Decision-Making Abilities
- Moving to Another State
 - Job Transfer
 - Grandchildren, or other family
- Buying or Selling a Business
 - Buy/Sell Agreement