



15 LIFE CHANGES THAT TRIGGER A REVIEW OF YOUR ESTATE PLAN

By: Sabrina Winters, Attorney at Law

I have written about this topic before and I am writing it again because it is so important to be aware of these life events and how they affect your life, outside of their immediate impact.

I always tell my clients to never approach Estate Planning as “once and done” or “sign it and forget it”. Our lives are continuously changing. Family dynamics change, our health changes, our marital status changes, etc.

You should make it a practice to have your Estate Plan reviewed every year or two to ensure your current plan accurately reflects any changes in your family circumstances. The life events listed below should serve as a reminder to you to have your Estate Plan reviewed. If you don't have an Estate Plan, this list should trigger an immediate visit with a Charlotte Estate Planning attorney to have an Estate Plan prepared.

1. You get married or divorced
2. Your spouse dies or becomes incapacitated
3. You become ill or disabled
4. You have a new child
5. Your child marries or divorces
6. Your child becomes ill or disabled
7. You have a new grandchild
8. One of your beneficiaries shows signs of being financially irresponsible
9. One of your beneficiaries develops a drug or alcohol problem

15720 John J. Delaney Drive, Suite 300, Charlotte, North Carolina 28277

(704) 843-1446

swinters@sabrinawinterslaw.com * www.ncestateplanninginfo.com

10. The value of your assets has increased
11. Your employment changes
12. You retire from your business or profession
13. You acquire property in a different state
14. You move to a different state
15. There have been law changes that may affect the language of your documents