



WHEN SHOULD I HAVE MY TRUST REVIEWED OR UPDATED?

LIFE EVENTS THAT NECESSITATE A CHANGE IN YOUR TRUST



Marriage



Divorce



Births



Deaths



**Change
in Health**



**Significant
Financial Changes**



**Beneficiary
Changes**



**New
Businesses**



**Real Property
Purchases or Sales**



**Changes in
Tax Laws**

We recommend having your trust reviewed by an experienced estate planning attorney every two years, even if you have had no significant changes in health, status or finances in that time. Periodic changes in state and federal laws may make certain updates necessary or advantageous.

Learn More About Trusts or Schedule a Trust Review
Call David L. Carrier, P.C. at 800-317-2812
Ask About Our FREE Workshops!