



How Often Should Legal Documents Be Reviewed?

Prepared for:
Mile Marker Club Members

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How Often Should Legal Documents Be Reviewed?

Once a legal document is completed and signed, it is often carefully laid to rest in a safe deposit box or file drawer and comes out again only when a party dies or a conflict arises.



Prudent persons periodically review and update their legal documents. Just how often depends, of course, on the document and which circumstances have changed. The following list sets forth some events that may require the updating of a legal document.

Life Events

- Marriage.
- Dissolution of a marriage (divorce).
- Death of a spouse.
- Disability of a spouse or child.
- A substantial change in estate size.
- A move to another state.
- Death of executor, trustee or guardian.
- Birth or adoption.
- Serious illness of family member.
- Change in business interest.
- Retirement.
- Change in health.
- Change in insurability for life insurance.
- Acquisition of property in another state.
- Changes in tax, property or probate and trust law.
- A change in beneficiary attitudes.
- Financial responsibility of a child.

If there is any question as to the effect of a change in circumstances on your will, trust, buy-sell agreement, asset titles and beneficiary designations, etc., contact the appropriate member of your team and have it reviewed before a crisis arises.

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