

Life doesn't stay the same, and neither should your Will and Trust.



Legal Document Review & Updates

When was the last time you had your Will or Trust reviewed?

Too often people create an estate plan, shove it in a drawer or safe deposit box, and never look at it again. This is a problem, because an outdated estate plan can be worse than having no estate plan at all! Reviews of your estate plan need to happen every two to five years to verify that the plan still supports your current needs and goals.

Situations that could require changes to your Will or Trust include:

- Relocation of primary residence

- Having a trust that requires you to split your trust at the first settlor's death

- Death or divorce in the family

- Receipt of an inheritance

- Change in what you want your beneficiaries to receive or how and when they will receive their requests

- Change in bequests to someone

- Acquired assets that need to be added to the trust

Don't leave your loved ones to fight through the unintended consequences of an outdated estate plan. The law office of Meyer & Yee will happily review your existing documents to align with your current circumstances and future goals.

Compassionate listeners. Experienced advisors.

Call 916-599-7297

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Call today to set up your appointment for a discounted price of \$50.00