

Checklist of Items That May Require Making a New Will

- Birth or adoption of a child/grandchild
- Marriage/divorce or new common law spouse or domestic partner
- Death of someone named in your will
- Children have reached the age of maturity
- Changing beneficiaries and/or how you want to distribute your estate to them
- A beneficiary becomes disabled and requires special care
- A change in the circumstances of your executor, guardians, trustees, etc.
- You would like to provide for or revoke bequeathals to a charitable or other organization
- A significant increase or decrease in the value of your estate
- You want to make changes in your estate plan to reduce taxes and/or avoid the probate process
- You have started a business
- A change in tax or inheritance laws
- You are approaching the age at which you are required to begin taking distributions from your IRA, 401(k), or other qualified plan – 72 years old
- You have moved out of state
- It has been three years or more since you have reviewed your will