



ATTORNEYS AT LAW

Charting a course for life's legal journeys.™

Annual Planning *Checklist*

In the past year, or potentially in the coming year, have you or a member of your family:

- Welcomed a new baby?
- Been married or divorced?
- Been diagnosed with special needs or a long-term illness like dementia, Parkinson's, etc?
- Lost a family member?
- Become part of a blended family?
- Bought or sold real estate?
- Determined that your wishes or circumstances have changed related to your heirs or inheritance?
- Inherited or will potentially inherit significant wealth?

You may need updated powers of attorney, healthcare directives, or an update to your will or trust.

Contact us for a quick review!



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