

# When to Update Your Estate Planning Documents

*If you answer "yes" to the following questions,  
it may be time for an update.*



# Originals

*Have you misplaced your original estate planning documents?*

**"Original" estate planning documents are the actual pieces of paper you signed.**

**Scans or photocopies of your documents do not work at critical times. An original Will is needed at death for probate. An original Power of Attorney is needed to sell real estate.**

**If you do not know where your original estate planning documents are, you should locate them right away or sign new ones.**



# People

## ***Are the people named in your documents no longer appropriate?***

**Your estate planning documents empower the people you choose to manage your personal and financial affairs when you cannot. The people you have named will be your executors, trustees, guardians, and agents in the event of your disability or death.**

**If the people you selected in the past are no longer appropriate because of age, changed relationship, different obligations, location, etc., you should update them.**



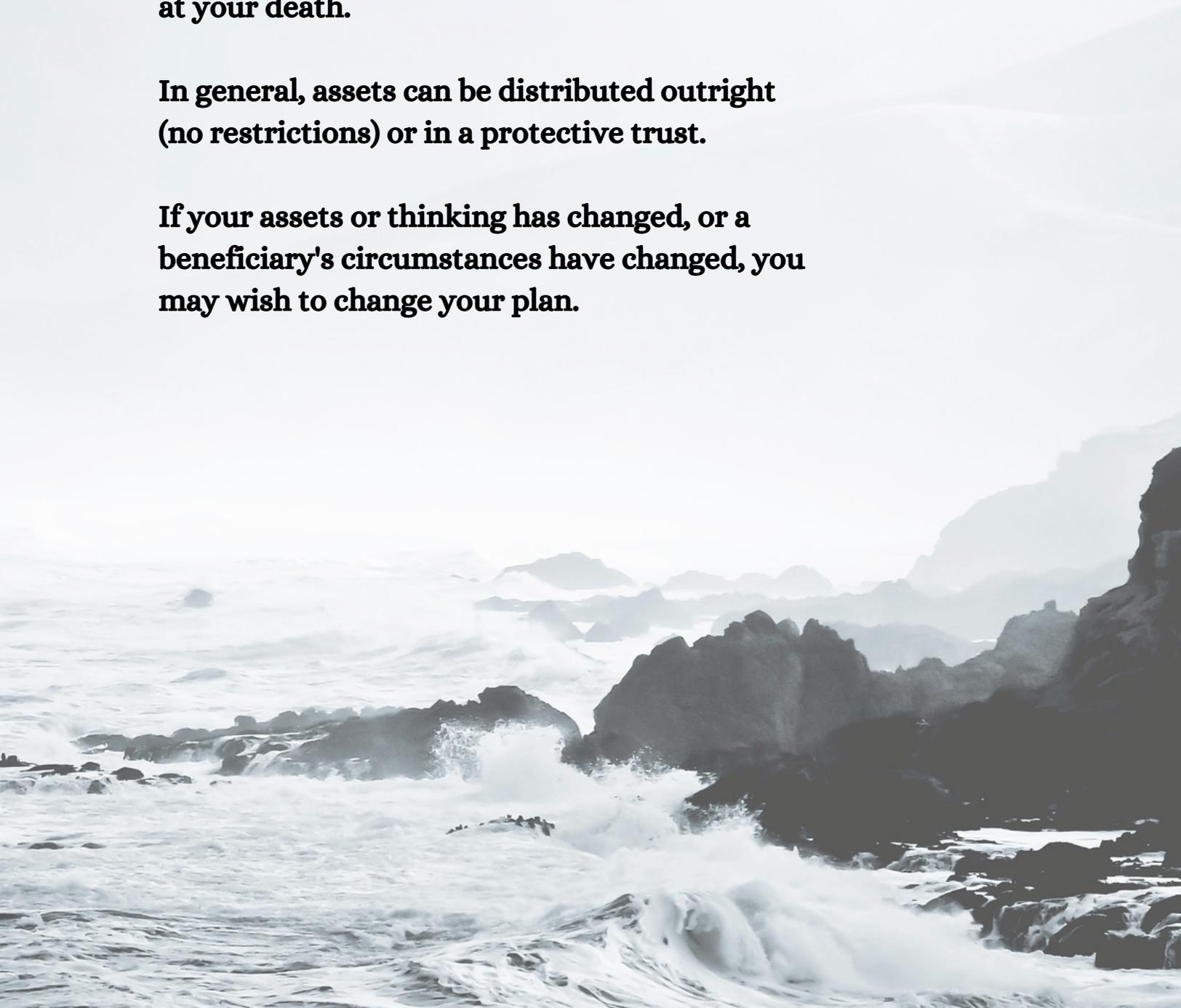
# Plan

***Has your intent changed since you signed your documents?***

**Your documents create a plan for how your assets will be distributed to your beneficiaries at your death.**

**In general, assets can be distributed outright (no restrictions) or in a protective trust.**

**If your assets or thinking has changed, or a beneficiary's circumstances have changed, you may wish to change your plan.**



# Events

***Have big life events occurred since you signed your documents?***

**You should review your estate planning documents every 2-3 years and whenever a major life event occurs - birth, death, marriage, divorce, move, etc.**

**A change in your life or one or more of your beneficiaries' lives may necessitate a change.**

**If your documents were signed more than 10 years ago, they may be outdated. If they were signed more than 20 years ago, there is little question they should be redone and brought up to date.**



# Time

***Are your documents more than 10 years old?***

**Your documents do not necessarily expire, but over time they become outdated.**

**Tax and other laws change, and your personal situation evolves.**

**If you signed your documents more than 10 years ago, it is time for a comprehensive review.**



# Summary

***If you answered "yes" to any of these questions, it is time to update.***

- Have you misplaced your original estate planning documents?
- Are the people named in your documents no longer appropriate?
- Has your intent changed since you signed your documents?
- Have big life events occurred since you signed your documents?
- Are your documents more than 10 years old?

***I have been helping clients create and update their estate plans for more than a decade. Please contact me if I can help you.***

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