

# 7 Reasons to Review Your Will

**Life changes—and your will should, too. As your situation and goals change, your estate plan should evolve to reflect your needs.**

## 1. Family

YES

- Have you or your children recently married, remarried or divorced? .....
- Have you gained family members either through birth, adoption or marriage? .....
- Do you need to determine a trusted guardian for your children? .....
- Have you experienced the death of someone dear to you? .....
- Have you or your loved ones experienced a significant injury or life-altering illness? ....
- Are you concerned about the financial maturity of your heirs? .....

## 2. Charitable Relationships

- Have you become more involved in your church or a particular ministry? .....
- Does your will reflect your Christian values and priorities? .....

## 3. Career

- Has your employer or income level changed? .....
- Do you have new business ventures? .....
- Have you recently retired or are you planning to retire soon? .....

## 4. Assets

- Has your estate experienced a significant increase or decrease in value? .....
- Have you bought, sold or moved a business? .....
- Have you bought or sold property? .....
- Have you changed the beneficiaries on your insurance policies or retirement assets?

## 5. Location

- Have you or those listed in your will moved? .....

## 6. Tax Law

- Have state or federal tax laws changed since you last reviewed your will? .....

## 7. Time

- Has it been more than three years since you last reviewed your will? .....



### Talk with a Planner

Through our partnership with Barnabas Foundation, you have access to complimentary will planning services with someone who understands tax-wise charitable planning from a biblical perspective. We'll help you review your will and make important, God-honoring decisions in an atmosphere of complete confidence and trust.

**Start your conversation by calling us today.**

*If you answered "yes" to any of these questions, it's time to review your will!*