



## **Is Your Will Up-To-Date?**

When was the last time you reviewed your will? People generally make wills to guarantee the proper disposition of their money and property, which is why it's a good idea to consult your CPA when it's time to create or update your will.

We recommend that you revisit your will every time you experience a major life event, such as marriage, the birth of a child, retirement or other significant milestones. Even if there is no meaningful change in your life, it's smart to review the document every couple of years to ensure it still addresses all your estate concerns and reflects your wishes. Changes in the value of your investments—such as a stock portfolio or real estate—may also require adjustments in your estate plans.

Reviewing your will may raise questions about various areas of your financial life, including your retirement or estate planning, college savings or other financial concerns. Be sure to turn to us for the perspective and advice you need to make the best choices.