

Dear Client:

It has been a pleasure working with you, and we have appreciated the opportunity to assist you with your estate planning needs.

Your estate planning documents have been executed with certain formalities, and they can be changed or revoked only by using similar procedures. In addition, your estate plan should be reviewed periodically to insure that it continues to meet your estate planning goals based on changes in your personal life or in applicable law. Please contact our office if any of the following events occur.

**MARITAL STATUS:**

1. Marriage, dissolution of marriage, or separation from your spouse.
2. Death of your spouse.
3. Serious illness, physical disability, or mental disability affecting yourself or your spouse.

**CHILDREN, GRANDCHILDREN OR BENEFICIARIES:**

1. Birth, adoption, marriage, or death of a child.
2. Dissolution of the marriage of a child.
3. Serious illness, physical disability, or mental disability of a child.
4. Financial irresponsibility, drug abuse, or alcohol abuse by a child.
5. Serious changes (good or bad) in the economic situation of a child.
6. Serious changes in your relationship with a child.

**PERSONAL CIRCUMSTANCES:**

1. Significant increase or decrease in the value of your estate.
2. Acquisition, formation, or dissolution of a corporation, partnership, or business interest.
3. Acquisition of out-of-state property.
4. Change of address.
5. Change in insurability regarding life insurance.
6. Retirement.

**CHOSEN AGENTS:**

1. Death or disability of a named executor, trustee, guardian, conservator, or attorney-in-fact.
2. Dissolution of the marriage of a couple named as guardians of your minor child or children.

If you have any questions regarding any of the above, please contact our office.