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Estate Planning

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WHAT IF MY ESTATE PLAN IS 20 YEARS OLD?

- 1- Power of Attorney is likely “stale”
- 2- Fiduciaries (Executor/Trustee/Guardian) no longer optimal – aged out/moved/children now adults and can serve
- 3- Balance sheet – reoptimize inheritance for children – consider lifetime asset protection trusts for children
- 4- Health Care Directives – HIPAA language
- 5- Partial plans – Will only
- 6- Old Will-based plan – may consider upgrade – Revocable Living Trust
- 7- Moved out of state
- 8- Marital status changed (divorced/widowed/remarried)

To learn more or schedule a free consultation, click here to get started today:

<https://www.irinashea.com/our-process>

