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REASONS TO REVIEW YOUR ESTATE PLAN

Your estate planning documents include provisions that reflect your family situation, assets and dispositive wishes, and the tax provisions in effect at the time you signed them. You should review your estate plan regularly to make sure that the documents will produce the intended results.

We recommend that you contact us to review your plan *at least every five years*, and more frequently if there are significant changes in your circumstances. Significant changes include the following:

- Marriage or divorce, or birth or adoption of a child.
- Change in circumstances of a child, such as reaching age 18, marriage, divorce or disability.
- Your disability or serious illness, or the death or disability of a spouse or other beneficiary.
- Increase or decrease in your assets or insurance, or changes in the ownership or title to them.
- Retirement.
- Change of domicile to another state.
- Desire to add charitable gifts or change manner of providing for charities.

Please remember that your Will does not control the disposition of an asset held jointly with right of survivorship or an asset with a beneficiary designation, such as a life insurance policy or an IRA or other retirement plan, or a transfer-on-death (“TOD”) investment account. ***If we have recommended*** any changes in asset ownership or beneficiary designation in conjunction with your estate plan, you must follow through with these changes in order for your plan to have the desired effect. We can assist you with this process if you wish.

We endeavor to notify all of our clients of developments in the law as they occur. But please contact us if you have questions about how new laws may affect you.