

Life Update List™

Instructions: From time to time, there may be a number of miscellaneous issues that impact your estate planning. Please review the list below and check the box for any items that apply. We will review your list and take appropriate action. In many cases we will simply note your file. For some, we may recommend that we conduct a Personal Counseling Session depending on the nature of the issue.

- I turn 70 this year and have retirement plans which I will soon be required to take distributions from
- I have changed employers and my employee benefits have changed
- I have a special health concern
- A family member has a special health concern
- I have a special financial concern
- I have a creditor problem or there is a possibility I may have a creditor problem
- A family member has a creditor problem or there is a possibility a family member may have a creditor problem
- A beneficiary of my trust has recently been married
- A beneficiary of my trust has recently been divorced or legally separated
- A beneficiary of my trust has legally changed their name, both the new and the prior name of the beneficiary are noted below
- I have a new son/daughter/grandson/granddaughter (their name is noted below)
- I have recently moved and my new address is noted below. I will confirm that you have a copy of my new deed.
- My home phone number is now : (_____) _____ - _____
- My mobile phone number is now: (_____) _____ - _____
- I have a new e-mail address, it is: _____
- I have changed primary care physicians (contact information noted below)
- I have a new financial advisor or accountant (contact information noted below)
- I have recently refinanced a property and removed my property from my trust. I will confirm that you have a copy of my deed which funded the property back into the trust.
- I have a personal matter I need to talk with my attorney about (please call our office to schedule an appointment)
- Other:

Special Concerns: There may be a long range concern that we are tracking on your behalf. Any long range concerns we have are noted below along with a notation as to when we suggest that this issue be addressed.

Concern	Recommended Action	When

Recommendations/Feedback: We continue to focus on how we can improve the quality of services we provide you. If you have any ideas, suggestions, recommendations or concerns, please take a moment to note those below.
