

CHECKLIST TO KEEP YOUR ESTATE PLAN CURRENT

UPDATED JUNE 2016

If you can't remember the last time you looked over your estate plan, or if more than three years have passed since you reviewed it with your attorney, it might be time to pull it out, dust it off, and review to make sure it still meets your needs. To change one or two minor provisions of your Will, your attorney may prepare a short amendment called a "Codicil." If changes are extensive, your attorney may draft a new Will. Reminder, never take matters into your own hands and try to change words or make notes on your legal Will or Trust as this may invite estate litigation.

AT THE VERY LEAST, YOU SHOULD REVIEW YOUR PLAN EVERY TWO TO THREE YEARS ESPECIALLY IF ANY OF THE FOLLOWING OCCUR:

- ☐ A move to another state
- ☐ Death of a spouse
- ☐ Divorce
- ☐ A significant change in your estate's value (for example, if you receive an inheritance)
- ☐ Incapacity or death of your spouse, executor, guardian, trustee, or agent
- ☐ Birth of children or grandchildren
- ☐ Change in charitable giving plans
- ☐ Change in philanthropic passions
- ☐ Change in estate tax and gift laws

For more information about using your Will to achieve your philanthropic goals, please contact Seattle Foundation's Philanthropic Services team at (206) 515-2111 or philanthropicservices@seattlefoundation.org.

Please note that the information contained herein is not intended to provide specific legal or financial advice and should not be relied upon as a substitute for such professional advice. Seattle Foundation encourages you to seek professional legal, estate planning and financial advice before deciding on a course of action.