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SPECIAL REPORT

“Twenty Three Reasons (at least) Why You Need to Prepare or Update Your Wills and Trusts Now”

If you answer “yes” to any of the following questions, it is time for you to prepare or update a Will, a Trust and other estate planning documents.

		Yes	No
1.	You are married for the second time and have one or more children from your first marriage who you would like to provide for.		
2.	You have one or more minor children for whom you wish to appoint a guardian to have custody of your minor children.		
3.	You have one or more children (whether or not minors) who are disabled or otherwise have special needs for whom you would like to obtain public assistance and yet set aside assets to pay for special medical treatments, special medical equipment, special rehabilitative programs and other special needs without disqualifying the child's eligibility for public assistance.		
4.	Your spouse is not a U.S. citizen.		
5.	You own some or all of your assets jointly with another person.		
6.	You own one or more life insurance policies.		
7.	You are the owner of an interest in a closely-held business.		
8.	You want to manage the inheritance that your minor children will receive.		
9.	You want to eliminate the possibility that family members whom you have not seen in years and with whom you have no relationship would receive an inheritance from your estate.		
10.	You desire to leave some gifts to charity.		
11.	You have one or more individual retirement accounts for which you have named a primary or first beneficiary, but have not named or do not recall designating a contingent (or secondary) beneficiary.		

12.	You are separated from your spouse but not yet divorced.		
13.	You wish to make arrangements to minimize and eliminate court proceedings and court involvement in your personal and financial affairs in the event you become incapacitated.		
14.	You have recently moved to Colorado and are wondering whether the documents drafted by the lawyer in another state are valid in Colorado.		
15.	You have ever lived in California, Texas, Idaho, Nevada, Wisconsin, Oregon, Alaska, New Mexico, or Arizona.		
16.	You wish to provide for your lifetime companion/partner primarily and before making any other gifts to family members.		
17.	You wish to nominate and appoint a personal representative and trustee of your own choosing.		
18.	You wish to make small gifts of certain of your items to specific persons.		
19.	You wish to revoke your current Will or make an amendment to your current Will.		
20.	You wish to revoke your current Revocable Trust or make an amendment to your current Revocable Trust.		
21.	You want to make sure that if a named beneficiary dies before you unexpectedly, an alternative beneficiary is listed to receive the inheritance.		
22.	You own real estate in states other than Colorado.		
23.	You want to review the changing tax laws and the impact such tax laws may have on your estate plan.		