Is it Time to Review Your Estate Plan?

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Creating or updating your will is one of the most important steps you can take to protect the people you care about and ensure your wishes are carried out.

Check Any That Apply to You:

Family Changes



- [ ] I got married or divorced.
- [ ] I welcomed a new child or grandchild.
- [ ] My beneficiaries have changed.
- [ ] A spouse, family member, executor, or beneficiary has passed away.

Financial Changes



- [ ] I purchased or sold a home.
- [ ] My assets or investments have changed significantly.
- [ ] I started a business or became a business owner.
- [ ] I received an inheritance.

Life Changes



- [ ] I retired or am approaching retirement.
- [ ] I've moved to another state.
- [ ] It has been more than 3-5 years since I reviewed my documents.
- [ ] I do not currently have a will.

If your circumstances have changed, our Estates, Tax & Elder Law attorneys are available to discuss your options and help ensure your wishes are reflected in your plan.

SCHEDULE A
CONSULTATION TODAY!
732-462-7170

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