

7 Reasons to Review Your Will



Life changes—and your will should, too. As your situation and goals change, your estate plan should evolve to reflect your needs.

1. Family

YES

- Have you or your children recently married, remarried or divorced?
- Have you gained family members either through birth, adoption or marriage?
- Do you need to determine a trusted guardian for your children?
- Have you experienced the death of someone dear to you?
- Have you or your loved ones experienced a significant injury or life-altering illness?
- Are you concerned about the financial maturity of your heirs?

2. Charitable Relationships

- Have you become more involved in your church or a particular ministry?
- Does your will reflect your Christian values and priorities?

3. Career

- Has your employer or income level changed?
- Do you have new business ventures?
- Have you recently retired or are you planning to retire soon?

4. Assets

- Has your estate experienced a significant increase or decrease in value?
- Have you bought, sold or moved a business?
- Have you bought or sold property?
- Have you changed the beneficiaries on your insurance policies or retirement assets?

5. Location

- Have you or those listed in your will moved?

6. Tax Law

- Have state or federal tax laws changed since you last reviewed your will?

7. Time

- Has it been more than three years since you last reviewed your will?



Talk with a Planner

Through our partnership with Barnabas Foundation, you have access to complimentary will planning services with someone who understands tax-wise charitable planning from a biblical perspective. We'll help you review your will and make important, God-honoring decisions in an atmosphere of complete confidence and trust.

Start your conversation by calling us today.

If you answered "yes" to any of these questions, it's time to review your will!