

When's the last time you evaluated your Estate Plan?



If you have any of these red flags, it might be time to update your Estate Plan. Give yourself one point for each checkmark.

- Assuming Estate Plans Are Only Meant for the Wealthy
- Putting Off Estate Planning for Too Long/Procrastination
- No Health Care Surrogate Designation, Durable Power of Attorney, Living Will, or Last Will & Testament
(1 point for each document you DON'T have)
- Neglecting Your Digital Assets
- Not Preparing for "What If" Scenarios
- Not Putting Enough Thought into Naming Agents
- Forgetting About Man's Best Friend
- An Unfunded Revocable Living Trust
- Outdated Beneficiary Designations
- Not Doing an Estate Plan During/After Divorce
- Trying to Leave Property to Someone with Special Needs
- Not Understanding How Your Assets Will Pass upon Your Death

How'd you do?

- 0-4 You could be good, but a review wouldn't hurt.
- 5-8 Could be time to have your estate plan updated.
- 9+ You're overdue. It's time to get your documents done!

DISCLAIMER: The information is not, nor is it intended to be, legal advice. You should consult an attorney for advice regarding your individual situation. The cost for legal services is determined based upon the documents prepared and varies by attorney. We invite you to contact us and welcome your calls, letters and electronic mail. Contacting us does not create an attorney-client relationship. Please do not send any confidential information to us until an attorney-client relationship has been established.

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GAPS LEGAL, PLLC

1580 Sawgrass Corporate
Parkway, Suite 130
Sunrise FL 33323
(by appointment only)

gapsattorneys.com
info@gapsattorneys.com

Attorneys

Michelle R. Kenney

954-372-7569

Alexandra V. Rieman

954-779-6475

