



THE LAW OFFICES OF
HOYT & BRYAN, LLC
FAMILY WEALTH & LEGACY COUNSELLORS

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Top Ten Reasons to Make Updating Your Estate Planning Documents Your New Year's Resolution!

Keeping your estate plan updated can be just as important as developing your initial estate plan. Once your plan is signed, many people will put them in a safe, a deposit box or leave a copy with their attorney, and then forget about it. However, there are countless reasons to review and update your estate planning documents every two to three years. If you can answer "yes" to any of the following situations, this is your year to update!

1. The individuals you have named in your plan are deceased.
2. New people should be named as part of your plan (e.g. birth, adoption).
3. There has been a divorce or marriage in your family.
4. New state laws. You need to periodically check to see whether your state has enacted new laws that impact your estate planning. More importantly, if you move to a different state, don't assume that your plan conforms to the requirements of your new state. Each state has its own legal requirements.
5. You would like to change your guardians, personal representatives, or trustees named in your plan.
6. Your children have reached the age of eighteen.
7. You have had a substantial increase or decrease in the value of your estate.
8. You have had an acquisition or disposition of a significant asset.
9. You are about to turn 70 and have an IRA, 401(k), or other qualified retirement plan that requires you to begin to take distributions at age 70 .
10. More than two years has passed since you created or updated your estate plan.

How many reasons do you have to update your estate plan? Call us for an appointment!

The Law Offices of Hoyt & Bryan assists families in the protection of their loved ones by focusing their practice in the areas of Estate Planning, Probate and Trust Administration, Elder Law including Medicaid and VA Planning and Special Needs Planning, Pet Planning, Business Succession Planning and Real Estate. The founders, Peggy Hoyt and Randy Bryan, are both dual board certified by the Florida Bar in Wills, Trusts and Estates

as well as Elder Law. Hoyt & Bryan is the only law firm in Florida with the distinction of two attorneys with these certifications. We offer many complimentary educational workshops each week in our Learning Center at The Law Offices of Hoyt & Bryan and monthly workshops in the Auditorium of One Senior Place in Altamonte Springs. For more information please contact our office at 407-977-8080 or visit our website HoytBryan.com.