

Is It Time to Review Your Will?

The right to plan your estate is a priceless privilege. With a will you can:

- Determine how, when and to whom your assets will be distributed.
- Name the executor who will manage your estate according to your wishes.
- Create trusts for the benefit of your spouse, children, grandchildren or others.
- Reduce the burden of federal estate taxes.
- Provide for those charitable organizations to which you are devoted.

Changes in any conditions in effect when you first drafted your will should cause you to reexamine your plans in light of new circumstances. We all need to be alert of events that signal a review of our estate plans.

Additions to the Family

The addition of a new family member, whether a child or grandchild, is a wonderful event. It is important to review your will to ensure that you have made provisions for this new individual.

Changes in Marital Status

Perhaps you are recently married, widowed or divorced. With these types of life changes a will is often overlooked and sometimes all together forgotten, until it is too late.

Moving to Another State

If you will be moving to another state or have recently moved to Kansas, review your will. Probate and trust laws are governed by state law and often vary from state to state.

Changes in Tax Law

This has been a year of change, while not every new tax law will have an effect on your estate plans there vary well could be one that does. With the great number of changes that have occurred over the last few months, you should review your will with a professional to see if any of the new tax provisions have an impact on your plans.

Health Conditions

A living will may be appropriate, and you may want to consider who will manage your affairs in the event of an incapacitating injury or illness.

Executors and Trustees

Experience, responsibility, and fairness – together with financial acumen and the ability to maintain detailed accounts – are all essential attributes of a good executor or trustee. Please keep these individuals named and current.

Your Charitable Interest

Organizations you have assisted during your lifetime will certainly miss your help when you are gone. It is important to review the charitable bequests you have made to see if they continue to reflect your present intentions.

If you have included Special Olympics Kansas as a beneficiary in your estate plans, please tell us about it. If not, let us show you how.

Call today! 913.236.9290 ext 102

Our current legal designation is: Special Olympics Kansas, Inc.
Federal Tax ID Number: 48-0890981

Return to:

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