BASSFORD REMELE

Estate Planning – Estate Plan Reviews: Ensuring Your Plan Stays Up-To-Date

At Bassford Remele, our focus is to help families preserve their wealth and achieve long-term goals. Regular estate plan reviews are essential to ensure your estate plan align with your current circumstances, family dynamics, and the ever-changing law. Our plan reviews help you maintain clarity, certainty, and confidence. Families should keep in mind that estate planning is a process, not a one-time event.

Our comprehensive estate plan reviews include the following steps:

- **Family Situation Assessment:** We will discuss changes in your family dynamics—such as marriages, divorces, births, health issues, the tragedy of having a loved one suffer from an addiction, or deaths—to ensure your estate plan reflects your current wishes and relationships.
- **Beneficiary Designation Review:** We will evaluate the beneficiary designations on your IRAs, retirement accounts, life insurance policies, and other assets, to confirm they align with recent legal changes and your intentions.
- **Asset Titling Verification:** Proper titling of assets is crucial for ensuring they are included in your living trust and avoid probate. We will review your asset ownership structures to ensure compliance with your estate plan.
- **Tax Law Analysis:** With frequent changes in tax laws, we will analyze the impact of new laws on your estate planning documents to determine if updates are necessary.

Additionally, we will address any questions you have regarding recent legal developments or adjustments needed to achieve your estate planning goals.

By reviewing your estate plan regularly—especially after major life events—you can ensure it remains effective and aligned with both your goals and personal values. Let us help you protect what matters most—your family's future and financial security.