Mr. or Ms. Client

123 Main Street

Anywhere, Florida 55555

Date

**RE: Estate Planning Awareness Week is Here!**

Dear [Mr. or Ms. Client],

October 21-27, 2019 is Estate Planning Awareness Week. Now that summer vacations are over and the kids are back in school, it is a great time to review or move forward with your estate planning. Because estate planning is a comprehensive plan and not just a single document, it is important to regularly review all aspects of your plan, your finances, and your family’s needs.

**Things to Review**

*Beneficiary Designations:* For assets such as life insurance and retirement accounts, the beneficiary designation form is a crucial document. If these documents are not filled out properly, the wrong or unintended person could end up with the asset, completely unraveling your estate plan. As a result, it is a good idea to review these documents periodically to make sure that the correct beneficiary is named. Life can change quickly, and sometimes changing beneficiary designations is the last thing on anyone’s mind.

*Temporary Guardianships:* In many states, a parent or legal guardian has the ability to appoint a temporary guardian for a minor child for a limited period of time. This appointment allows the temporary guardian to make decisions on behalf of the minor as if he or she were the child’s parent, without court involvement or approval. This document can be helpful if a minor child is going to be staying with a relative or close friend for a period of time because a parent or legal guardian is on vacation or otherwise unavailable. If you live far away from family, it may also be a good idea to have a friend or trusted neighbor have a temporary guardianship for your children. However, this appointment is usually only valid for a short period of time (up to twelve months in some states) and needs to be re-signed regularly. If you have children, you should have a temporary guardianship and make sure that this document has not expired.

*Ensuring proper ownership (“title”) on property:* If you have a trust as part of your estate plan, you have to ensure that the assets that are intended to be owned by your trust have either been retitled in the trust’s name or will transfer to the trust automatically at your death. To make sure that this is done, check your beneficiary designations, account statements, and any other documents associated with your assets. If you have not properly funded your trust, those assets will go through probate, which can be a time consuming and expensive process. If you are unsure and need help reviewing the ownership of your property, we are happy to help.

*Your Appointed Decision-Makers:* Proper estate planning involves a lot of moving parts and people. You have probably named a Successor Trustee in your trust, an Attorney-in-Fact (“agent”) under your Financial Power of Attorney, and a Patient Advocate (“proxy” or “healthcare agent”) under your Medical Power of Attorney. Depending upon how long it has been since we first prepared the documents, it is important to review your decisions and make sure that these individuals are still able to act on your behalf if you need them to. Just like your life has gone through changes, these individuals may have had a change in circumstances that make them less able or desirable to serve in these important roles.

*Important Information for Trusted Decision Makers:* While your estate planning documents appoint individuals to act on your behalf and give them the authority to do so, they sometimes do not contain all of the necessary information to handle your affairs, manage your finances, or make decisions on your behalf. As you review your estate planning documents, it is also a good idea to compile a “road map” for your fiduciaries. Some of the information you may want to consider including is:

* Your social security number
* Your doctor’s names and contact information
* Your pertinent medical information, including care providers and medications
* Your professionals’ (accountant, financial advisor, life insurance agent, etc.) names and contact information
* Bank account numbers
* Where to find your important documents
* Contact information, dates of birth, and social security numbers for your children
* Information regarding your pets

By compiling this information and making it accessible to your trusted decision-makers, you can help them be better prepared to carry out their roles.

**Schedule a Meeting with Us**

Life changes pretty quickly. It is always a good idea to periodically review your estate planning documents to make sure they reflect any changes that have occurred in your personal life or in the law. In some cases, it can be beneficial to schedule a time for us to review the documents together. If there have been any marriages, divorces, deaths, births, etc. in your family, this can impact your estate plan, and it is crucial that the instructions in your estate planning documents reflect your wishes.

We are here to offer peace of mind to you and your family while you are alive and to your loved ones after you have passed. Give us a call so we can make sure that everything will still work as intended to achieve your goals. If you do not currently have an estate plan, we are here to guide you and help craft a plan that will protect you and your loved ones.

Sincerely,

[Attorney Signature]