

## General Checklist for Updating Documents

**General checklist of events to review that may prompt you to update your documents:**

- Death of any person named in the documents
- A substantial increase or decrease to your assets
- A change to how you own your assets
- The acquisition or disposition of major assets i.e. sold the family home
- There is a material change to you or any of your appointed or named people
- Are you satisfied with your choice of Executor/Trustee/Attorney and is your named Executor/Trustee still able to administer your estate?
- A change to your family status i.e. married, 2<sup>nd</sup> or 3<sup>rd</sup> marriage, common-law, divorce
- A serious or sudden change to your health or any persons named in the documents
- Incapacity of appointed people
- New family members i.e. birth, adoption, grandchildren
- Laws are updated or changed
- Change of Guardians
- Children are no longer Minors
- General passage of time, but review is recommended at least every 3-5 years

Beverly Carter is a legal professional in British Columbia, Canada with a focus on Wills and Estate Planning. She published the Estate Workbook to help Canadians better plan and organize their own estate.

If you have any more questions regarding updating your documents or creating them feel free to give us a call at **(250-383-4100)**.

If you need a secure place to keep all of your information regarding Wills, Contacts, Credit Cards and more feel free to purchase our Estate Workbook at <https://estateworkbook.ca/>