

Client Bulletin

Copyright 2015 LaSusa Law Offices, PLC

Question: How often or when should I review my estate plan?

At some point in time, everyone should have an estate plan set up directing how your taxable property should be handled or transferred to heirs of your estate. Most people only start to think about this when they get older, but everyone should create an estate plan if they have any property that needs to be managed in the event of death or disability. From time to time, every estate plan needs to be modified to remain effective.

Answer: Generally after any major life event or change in estate tax law.

You should always review your estate plan after any major life event: birth, marriage, divorce, disability of yourself or an heir, or death of an heir, or any significant change in your personal economy or change in the estate tax codes.

We provide prospective clients a quarter hour consultation free of charge to review your current estate plan.

MAKING AND SAVING CLIENTS MILLIONS OF DOLLARS BY AVOIDING LEGAL PITFALLS. SM



EXPERIENCED. EFFECTIVE. EFFICIENT.

ATTORNEYS LICENSED IN ILLINOIS, MICHIGAN AND WISCONSIN

AREAS OF SPECIALIZATION

- **WEALTH MANAGEMENT:** BUSINESS SUCCESSION AND ESTATE PLANNING, PROBATE AND TRUST ADMINISTRATION
- **COMPLEX COMMERCIAL LITIGATION:** EXPERTISE IN CREATIVE NEGOTIATION AND TRIAL LITIGATION
- **CORPORATIONS, LLCs AND PARTNERSHIPS:** FORMATION, OPERATION, MERGER, ACQUISITION OR SALE
- **EMPLOYMENT AND LABOR:** HIRING, FIRING, DISCIPLINE, AND COVENANTS NOT TO COMPETE
- **INTELLECTUAL PROPERTY:** COPYRIGHT, TRADEMARK, TRADE SECRET, REGISTRATION, ENFORCEMENT AND LICENSING
- **REAL ESTATE:** PURCHASES, ZONING, LAND DEVELOPMENT, CONSTRUCTION, SALES AND LEASING, PROPERTY TAX APPEALS AND ABATEMENTS

CHICAGO, IL
(312) 371-1200

LONDON, UK
011-44-2032-393605

TRAVERSE CITY, MI
(231) 392-9616

EMAIL: INFO@LASUSALAW.COM
WEBSITE: WWW.LASUSALAW.COM

This Client Bulletin is not intended to be a source of solicitation or legal advice. Legal advice varies depending on the facts; for that reason, the information in this Client Bulletin should not be acted on without consulting a lawyer.