

7 REASONS TO REVIEW YOUR WILL

Maintaining a Plan That Reflects Your Values and Goals

Life changes – and your will should, too.

If your situation, priorities or goals have evolved, or if it's been a while since the last time you looked at your legal documents, it's time for a thorough review.

The Power of an Up-to-Date Will

Your will is an important and powerful document. Through it, you proactively care for the needs of your loved ones and determine the next stewards of your God-given resources. It's also a lasting testimony to your family and to the world, declaring what matters most to you.

A completed, up-to-date will can also help you:

- Minimize family disputes.
- Protect your loved ones from unnecessary taxes and fees.
- Establish guardianship for minor children.
- Provide for loved ones with special needs.
- Give in a profound way to the ministries close to your heart.

Conversely, a non-existent or outdated will leaves your loved ones vulnerable to uncertainty, chaos, wasted time and needless expenses. You also miss out on the opportunity to bless and advance your favorite causes in a substantial way.



Time to Review Your Will?

There are seven common reasons that warrant an update to a will, trust or other estate planning documents. Flip to the back for a questionnaire to determine if any of these reasons apply to you.

Do any of these circumstances apply to you?

1. People

YES

- Have you or your children recently married, remarried or divorced? ☐
- Have you gained family members either through birth, adoption or marriage? ☐
- Do you need to determine a trusted guardian for your children? ☐
- Have you experienced the death of someone dear to you? ☐
- Have you or your loved ones experienced a life-altering injury or illness? ☐
- Are you concerned about the financial maturity of your heirs? ☐
- Is there an executor, guardian or other personal representative named in your plan who is no longer available or suitable to serve? ☐

2. Charitable Relationships

- Does your will reflect your Christian values and priorities? ☐
- Have you become more involved in your church or a particular ministry? ☐
- Do you support a ministry you would like to bless through your will? ☐

3. Career

- Has your employer or income level changed? ☐
- Do you have new business ventures? ☐
- Have you recently retired or are you planning to retire soon? ☐

4. Assets

- Has your estate experienced a significant increase or decrease in value? ☐
- Have you bought, sold or moved a business? ☐
- Have you bought or sold property? ☐
- Have the beneficiaries changed on your insurance policies or retirement assets? ☐

5. Location

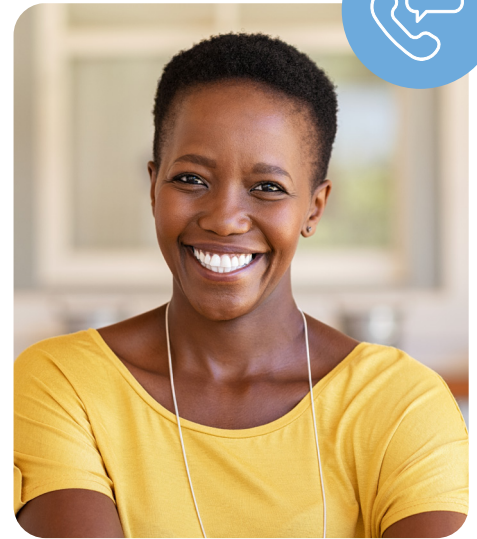
- Have you or those listed in your will moved? ☐

6. Tax Law

- Have state or federal tax laws changed since you last reviewed your will? ☐

7. Time

- Has it been more than three years since you last reviewed your will? ☐



Talk to a Planner

Through Barnabas Foundation, you have complimentary access to trusted planning support, all from a biblical perspective.

A Barnabas Foundation planner will help you develop a plan that honors God, cares for the needs of your family and supports the causes that mean so much to you.

Learn more by calling 888.448.3040 or email planning@BarnabasFoundation.org.

If you answered “yes” to any of these questions, it’s time to review your will!