

ESTATE PLANNERS FOR LIFE™
Cain, Cain & Janik, PLLC

Don't Wait
For a Crisis.

Join us for a
Free Estate Planning Workshop

If you have no plan or think yours is “good enough,” this workshop will help you understand how to MAKE SURE your plan will protect you when you need it.

• What happens if you pass with no plan?

• What do probate, will & trust mean?

• Why don't most estate plans work?

• Our 3-step strategy for planning-it works!

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~A MATTER OF TRUST~

Giving Straight Answers
to Common Estate
Planning Questions

By Tamara Cain, Attorney and Estate
Planning Educator, Cain, Cain & Janik

Q: Once I sign my estate
plan, am I finished?

A: That may be the most
common misconception I
encounter in estate planning.
After helping hundreds of
families over many years, I've
noticed that most people view
estate planning as a project. They gather information, meet with
an attorney, sign documents, and check an important item off
their to-do list. Once the documents are signed, they are placed
in a safe location and often remain there for years without any
other thought.

The problem is not that the plan was poorly designed. In many
cases, the plan was exactly what the family needed at the time.
The problem is that life continues to move forward while the
documents remain unchanged.

When I meet with families who created their plans ten, fifteen,
or even twenty years ago, I often find that their circumstances
have changed significantly. Children have grown up and started
families of their own. Grandchildren have arrived. Marriages
and divorces have reshaped family relationships. People named
trustees, personal representatives, or powers of attorney may
have moved away, become ill, or passed away. Assets that once
represented a substantial portion of the family's wealth may have
been sold, inherited, or replaced with something entirely different.
Our experiences teach us that estate planning is not really about
documents. It is about people. And people rarely stay the same
over the course of twenty years.

In our practice, we often work with families during some of
life's most difficult transitions, including disability, illness, and
death. Those experiences have reinforced an important truth: the
plans that tend to work best are usually the ones that have been
reviewed from time to time as life unfolds. Major revisions are not
always necessary. Often the greatest value comes from simply
confirming that the plan still reflects the client's wishes and that
the individuals named in important roles are still the right choices.

There is another benefit that is frequently overlooked. A
periodic review helps establish or maintain a relationship with

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BIBLE WORD SEARCH

Answers

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