

New Year Review and Update



It's not too late to consider making a 2020 resolution to review important personal and financial documents to be sure they are current, such as:

- Your will.
- Your living will.
- Power of attorney.
- Beneficiaries on life insurance and retirement plans (check for the exact wording and spelling of your designated beneficiaries).

For a sampling of other important documents to take into account, see [Checklist of Important Legal Documents](#).

For an e-learning opportunity on the five essential documents for estate planning, go to https://www.advantageengagement.com/content_detail.php?id_cr=64942. Please note the link to the e-learning session on this web page opens best in Internet Explorer or Firefox.
