

The Makofsky Minute | March 23, 2022

Spring Has Sprung



Spring is a time for welcoming warmer weather, shaking off the cobwebs and cleaning up all those things that you ignored during the doldrums of winter. Dusting, vacuuming and cleaning the windows are a must, but when engaging in spring cleaning, remember to also review your legal and financial documents to make sure they are current and still reflect your wishes. Here is a list of important items to check:

- The named beneficiaries of your retirement accounts, life insurance policies, annuities and other financial investments
- The name(s) of your nominated Executor(s) and/or Trustee(s) in your Will or Trust
- The identity of the agent and successor agent for your Power of Attorney
- The name of your Health Care Proxy agent and substitute agent

Are the choices you made years ago still reflective of your current wishes? If you think it's time to review and/or update your estate and disability plan, please give us a call so one of our knowledgeable attorneys can assist you.

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Don't forget to visit the Makofsky Law Group, P.C. Facebook and Instagram pages and like us!

For more helpful information and to keep up to date on all Elder Law and Trust and Estate matters, visit our website at www.makofskylaw.com.

Don't forget to share any information you found helpful and informative with your friends and family!

Do you need a speaker for your group? Invite us to present for your group or organization either in person or virtually!



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