

Your Estate Planning Clean-Up Guide

Is Your Plan Up to Date?

It's easy to know when to renew your driver's license or credit card—just look at the expiration date. But what about your estate planning documents? Keeping these current is an essential part of creating the future you envision, but they don't come with expiration dates.

As you tackle your spring cleaning projects this year, take time to clean up your estate plan as well—the chart below can help.

Document	What it is	Where to keep it	When to update it
Will/Living trust	These documents direct your trustee or personal representative on how to distribute your estate.	In a fireproof emergency kit. You should also give a copy to your trustee or personal representative.	Every 2 to 5 years or immediately after experiencing a life event such as: <ul style="list-style-type: none">• A move to a different state.• A change in marital status.• The addition of a child.

<p>Durable power of attorney</p>	<p>This document allows someone of your choice to carry out financial matters for you in the event of an illness or disability.</p>	<p>In a fireproof emergency kit. You should also give a copy to the person you appointed.</p>	<p>If your relationship with your chosen person changes or if this person predeceases you.</p>
<p>Health care proxy and living will</p>	<p>These documents name an individual to make health care decisions if you become unable to do so.</p>	<p>Give copies of the form to your health care provider(s) and the person you named as your proxy.</p>	<p>If your relationship with your chosen proxy changes or if this person predeceases you.</p>

Are We in Your Plan?

If, as you review and update your plan, you decide to include a gift to Mind Oasis, please let us know by contacting Karuna - kelly@mindoasis.org. It would be our honor to thank you for your generosity and to add you to our Circumpunct Society!