## CLIENT FOCUSED. RESULTS DRIVEN.

## DOES YOUR ESTATE PLAN NEED AN UPDATE?

Codicil

Amendment

Do you have an NO YES estate plan? Does it YES need to be - JUST DID IT reviewed? What is your Schedule an WILL --TRUSTfoundational appointment estate planning I DON'T KNOW with us document? Come see us in 3-5 years or Call us to How many when you move, discuss How many changes need your marital changes need 10R2 to be made? status changes, 10R2 to be made? or your family Although codicils and amendments are generally • changes (birth, used to make smaller or simpler changes and new **3 OR MORE 3 OR MORE** adoption, etc.) wills or trust restatements are used for larger or more ¥ Are these complex ones, there is no bright-line rule when it Are these simple comes to making changes to your estate planning simple NO 🔶 New Will - NO — Restatement changes? documents. This diagram is intended as a general changes? guide for updating your estate plan. • YES YES David Lucas is an attorney in the Estates & Trusts **3 OR MORE 3 OR MORE** practice group at Miller, Miller & Canby, licensed to Have you already Have you already practice in Maryland and the District of Columbia. He YES made previous YES made previous focuses his practice in Estate Planning and Trust and changes? changes? Estate Administration. He provides extensive estate How many? How many? and legacy planning, asset protection planning, and retirement planning. 1 OR 2 1 OR 2 NO NO ↓

DAVID A. LUCAS I 301.762.5212 DALUCAS@MMCANBY.COM

200-B MONROE STREET ROCKVILLE, MD 20850 • MILLERMILLERCANBY.COM