



Review Your Plan

August 2021

Senior Management Services

We talk often about the importance of creating an Estate Plan for your older loved one, but also for you. This could be in the form of a Last Will and Testament, Financial Power of Attorney, Advance Directive/Living Will and financial beneficiaries. However, when was the last time you reviewed those documents? Are they accessible to those who need them in the case of an emergency?

Attorney Jeff Bellomo of Bellomo and Associates says that it is important to review these documents every few years.

"If you have not had it reviewed by a professional in the last three or four years, take the time now to bring it to someone to review to ensure that everything is the way that it needs to be.

We also encourage you to take the time, once your documents are reviewed and updated as necessary, to talk to your family about your planning when you are on your adventures and at family gatherings to make sure that everybody knows what your wishes are and what your plans are for the future."

Travel is a part of our lives, especially over the summer, so take the opportunity to review your Estate Plan in the case of an emergency. It can be devastating for families who do not have a long-term plan in place. If you need to create an Estate Plan and any of the documents listed above, contact Senior Management Services at **800-253-9236** and we can help you get your plan in place.

For additional information about Eldercare, please contact Quest at 1-800-364-6352.

Now is a Good Time to Review Your Estate Plan by Jeffrey Bellomo

<https://bellomoassociates.com/2021/06/03/now-is-a-good-time-to-review-your-estate-plan/>