



ESTATE PLANNING REMINDER

Your Mid-Year *Estate Plan* Check-In

Dear Clients,

I hope you are enjoying a healthy and productive summer. Earlier this year, I wrote to encourage clients to review their estate plans and trust arrangements as part of a bi-yearly check-up. As we reach the midpoint of the year, I wanted to offer a gentle reminder in case this is still on your list.

A mid-year review is particularly helpful if:

You have experienced any significant personal or financial changes.

You have a trust that may require updated funding or beneficiary coordination.

We previously began work on your documents but have not yet finalized and executed them.

Even in the absence of major changes, periodic reviews help ensure that your plan remains current, effective, and aligned with your goals under the evolving legal and tax landscape.

If you would like to schedule a review, or if you have any questions about your existing plan, please reach out to schedule an in-person or virtual appointment for your convenience.

Thank you, as always, for the trust you place in my counsel.

*Warm regards,
Alessandra*

Schedule your mid-year review — in person or virtually, at your convenience.

EMAIL ME

CALL 203-249-3601