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CAN YOU TRUST YOUR #TRUST?

CHARLES GRIPPO

ATTORNEY AT LAW

PARK RIDGE, ILLINOIS 60068

773—704 —2302

charlesgrippolawyer.com

<https://www.charlesgrippolawyer.com>

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CAN YOU TRUST YOUR #TRUST?

You've taken the right steps to save your loved ones from a legal mess when you pass away by establishing a #TRUST. Good for you. But **CAN YOU TRUST YOUR #TRUST?**

There are many good reasons to review the terms of your trust with the aid of an #Estate Planning Attorney. There may be reasons to amend it or even create an entirely new trust.

Let's consider the possibilities, shall we?

1. Have your goals and intentions changed you created your trust?
2. Have there been changes in your marital or family situations—like divorces, deaths, disabilities of beneficiaries, births, or adoptions of new family members/beneficiaries?
3. Has your financial situation changed?
4. Have you disposed of #assets you owned at the time when you created your trust?
5. Have you acquired assets you did not own at the time when you created your trust?
6. Have you started or purchased a #business since you created your trust?
7. Conversely, have you disposed of a business you owned at the time when you created your trust?

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8. Are there #beneficiaries of the trust whom you now may want to disinherit?
9. Conversely, are there persons you omitted from the trust whom you now want to name as beneficiaries?
10. Are there any changes you want to make to the trust?
11. Have you created a trust for your BFF—your dog, cat, or other pet?
12. Are there #charities you now want to gift that are not remembered in your trust?
13. Conversely, are there charities you remembered in your trust whose gifts you now want to change or remove entirely?
14. Do you now want to change the distribution of shares you have previously given to one or more beneficiaries in your trust?
15. Have there been changes in the law that may affect your trust?
16. Is your trust more than 3 years old? Trusts—and indeed all your estate planning—should be reviewed every three years to keep it up to date.
17. Do any of your beneficiaries now need #guardians/trustees to manage their affairs?

CHARLES F GRIPPO

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18. Are any of your beneficiaries receiving #Medicaid or other government assistance? Or might one or more of them need Medicaid or other government assistance in the foreseeable future?
19. Is it possible that you or your spouse may need Medicaid or other government assistance in the foreseeable future?
20. Is your trust complete? Or are important provisions missing?

I have been an attorney for 47 years. I have helped many clients with their Estate Plans, including trusts—for estates both large and small. I would be happy to meet with you and review your trust, as well as any other estate planning you may have done. And I will give you my unbiased guidance to help you determine whether your plan is up to date and reflects your current situation, needs, and goals.

Please call or email me. Virtual appointments are available.

Charles F. Grippo

Attorney At Law

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IMPORTANT NOTE

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