

# Spring

2017

## Mark Your Calendars!

**June 1**

Say Something Nice Day

**June 2**

Leave the Office Early Day

**June 17**

Eat Your Vegetables Day

IN CONGRESS, JULY 4, 1776.  
A DECLARATION  
BY THE REPRESENTATIVES OF THE  
UNITED STATES OF AMERICA,  
IN GENERAL CONGRESS ASSEMBLED.

WE the People of the United States, in order to secure these rights, do hereby declare that all men are created equal; that they are endowed by their Creator with certain unalienable Rights, that among these are Life, Liberty and the pursuit of Happiness. That to secure these rights, Governments are instituted among Men, deriving their just powers from the consent of the governed, -- That whenever any Form of Government becomes destructive of these ends, it is the Right of the People to alter or to amend it.

**July 4**

WLG Offices will be closed

**July 11**

Cheer Up the Lonely Day

**August 8**

Happiness Happens Day

**August 26**

Dog Appreciation Day

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# Worth Knowing



this issue

Need to Update? P.1

Legacy of Literacy P.3

Stay in Touch P.4

## Wondering Whether You Need to Update Your Estate Plan?

Please allow us to be frank. It's unrealistic to think that a piece of paper you draft, reflecting your life at a certain time, will work when your life has completely changed some years later. We will use the Kendricks, a fictional family, as our example.

### Meet the Kendricks

Meet Bill and Karen Kendrick. They put their first estate plan in place when their daughter, Jessica was born 30 years ago. They updated it when their son Steve came along four years later. They attended one of our living trust seminars 10 years ago and got a fantastic trust-based plan in place, protecting themselves, their children, grandchildren, and dog, Sadie.

The Kendrick family chose to not join a trust maintenance program, unfortunately. Instead,

they elected to assume the responsibility for calling for updates themselves.

Life got busy and, as you might guess, that didn't happen.

*Here's what's changed in their lives in the last 10 years:*

- Jessica and Steve are now adults and through college.
- Jessica has married and now had two daughters. One of the girls may have autism.
- Steve is also married and is expecting his first child.
- Karen's mother is now living with them.
- They bought a vacation home in Florida.

*Do you think their estate plan will still work the way they want it to?*

# Wondering Whether You Need to Update Your Estate Plan? **Yes, You Do and Here is Why.**

## Changes in Your Own Life

The Kendricks have gone through a lot of changes, but those are typical. Think about the changes in your life over the past 10 years - or - since you last updated your estate plan.

Have you moved? Do you have more children or grandchildren? Have you started a business, suffered health problems, or purchased a new home? Do you have new accounts and investments?

Do you now care for a parent, pets, or dependent children? Have you remarried? Have you recently divorced, or retired? Has someone you loved died? Have friends named in your plan as trusted helpers moved away or has your relationship changed?

Are your children now adults and able to help you? Do you want to help with grandchildren's college or dance lessons? Do you see the world in a different way?

Many things have happened in the past 10 years. Your estate plan needs to reflect the changes in your personal life, financial situation, and goals. There have also been changes in the law and we continuously learn to protect our clients in better ways.

## Is Your Estate Plan Out-of-Date?

If you have experienced changes like the Kendricks or it has been more than 3 to 5 years since you updated your estate plan, it's time to come in. We'll review your plan and chat with you about ways to improve it.



## CAN YOU SEE ME NOW?

These glasses were left in our office recently.

We would love to be able to return them to their rightful owner.

If they belong to you, please contact Hayley at 608-833-4001.



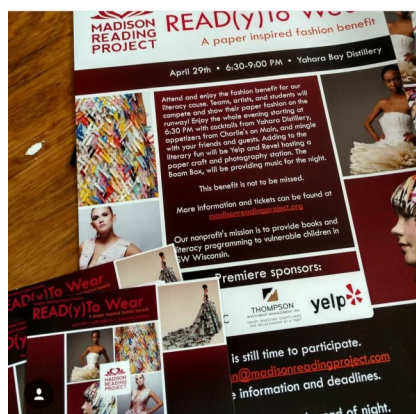
**Two of the leading causes of illiteracy are: parents with little schooling and a lack of literacy support at home.**

“Many find it difficult to even think of these issues, let alone discuss them with others – especially their children. As a result, it may be difficult for you to learn if....”

(Wilson, Purtell, Haslam, 2013, pg.77)

“Two out of every three kids living in poverty do not have books at home. We're passionate about helping kids find a love of reading and learning, and our mission is to give as many books as possible to at-risk kids in the area. Through our book donations and literacy programs, we can achieve this goal,” Rowan Childs, MRP, Executive Director stated, “We help inspire a love of reading and share the joy of books today. In 2016, our goal was to give 5,000 books; yet, we doubled our goal and gave over 10,000 books. Our goal for 2017 is to more than double that and give 25,000 to local kids.”

Wilson Law Group was honored to be able to support MRP's annual fundraiser, READ(y) to Wear. We are even more excited to announce our on-going support of this grassroots enterprise, and our commitment to leaving a **legacy of literacy** in our community.



We will be collecting children's books in our office, and at special events, to donate to the Madison Reading Project throughout the remainder of 2017. Besides donating books, there are so many other ways to help support children's literacy. You could host a book drive or help sorting donated books at their new location on the west side of Madison.

Email Rowan for more information at [rowan@madisonreadingproject.com](mailto:rowan@madisonreadingproject.com)



Are you missing out on the latest estate planning news and all the fun we have here at Wilson Law Group? Follow @WLGLegacy on social media to keep up-to-date and join in!

