STEVE RAUSCH
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Sign up for my Quarterly Newsletter via email: ***steverauschlawoffice.com***

Hello to all my Clients,
It's almost Spring, if the weather would cooperate. I know my kids are ready for warm weather and all the outdoor activities in the Treasure Valley. Lauren, a senior at Rocky Mountain High School, is planning a spring break trip to New York with the Musical Theater Department. They are seeing a Broadway show and attending various workshops for Musical Theater students. We are also planning another wedding in the family. My daughter Ashley is next up in May. Her fiancé is an Accountant for the Bureau of Reclamation, and she is already employed as a head of testing wi-fi-solutions for Cradlepoint. Megan is working on her psychology degree, and traveling to Texas and back frequently. Other exciting news of 2017 is that Brandon and Athena are expecting a baby. Ready or not, I'm going to get to be a grandpa!

I will be teaching a class April 1, at an event called Incredible Age Expo. KIVI, CapEd and Idaho's Money Show are coming together to celebrate Idaho Baby Boomers' health, wellness, saving, investing and of course, I'm explaining 10 Reasons for Estate Planning. My time slots are 11 to 11:45 and 3 to 3:45. It will be held at Expo Idaho (fairgrounds) See http://www.kivitv.com/incredible-age-expo for more information and registration.

If you would like to receive my quarterly newsletter via email or need to change your address or other information, let us know. I also welcome referrals. I am honored to help your family and friends.
Best Regards,

Steve

I'm still co-hosting **Idaho's Money Show** Monday-Thursday weeknights from 6-7pm on KIDO (580AM or listen live on your computer at 580kido.com). I post summaries of various shows on my website too. Call in, or email your questions anytime. We welcome your feedback, questions or comments on the topics of the day.

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Annual Maintenance on Your Estate Plans

Because life changes, most attorneys recommend annual maintenance meetings to discuss your estate planning documents. This is just as important as the actual creation of the documents. We like to revisit your plan to make sure we incorporate any changes. Annual meetings give us the opportunity to:

1. Review your estate plan and make sure it still accomplishes your goals. This includes anything from changes in distribution of assets to children or grandchildren, to changing trustees. Are your trustees still ready, willing and able to assist in the event that you need them? Other examples would be revisiting your assignments of guardianship for young children and other changes that may be necessary due to marriage or divorce.

2. Review changes in state and federal law. The last big changes to estate planning laws were in 2013. This year we are primarily concerned with changes in the healthcare laws and tax-related laws. If you are retired, it is always a good idea to revisit your health insurance and long term disability insurance coverage.

3. Review any changes you may have made to your assets. We need to consider any assets you have been gifted, inherited or purchased. This property, and your future plans for it, should be included in your documents. The sale of any property will have already been dealt with in the sale documents, but any new property needs to be included in your trust.

4. Discuss any further planning or goals. After your estate planning documents are in place, other questions may come up. This is the time to make adjustments if you would like to make changes in distribution schedules, asset allocation and additions or subtractions of children or grandchildren.

Full Article at:
http://steverauschlawoffice.com/index.php/annual-maintenance-meetings/

Please call anytime to set an appointment with me to revisit your estate plan, and answer your questions.