



# Annual Alignment Analysis

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If there is one certainty in life, it is that change is constant. Congress, the IRS, and the courts will change our laws; family circumstances evolve; new and improved planning techniques are developed to solve issues we didn't ever know existed, or hadn't recognized, ten or even just five years ago. To keep up with changes and ensure your estate plan is current, we provide an annual review of your plan.

This Annual Alignment Analysis, formerly known as "Client Link", is an integral part of our estate planning services. It ensures a regular review of your plan so that it remains relevant and maintains its value.

The Annual Alignment Analysis also provides you with the opportunity to review any changes in your situation and how the changing laws impact it.

The Annual Alignment Analysis is part of a suite of estate review services DWS provides following the creation of your initial estate plan. Services included in your annual membership are:

***Funding Assistance***

A review of your ownership and beneficiary designations for various classifications of assets. You will be provided with a recommendation letter to give your advisors letting them know exactly what to do. This funding review ensures that any additional assets you acquire during each year are properly incorporated into your estate plan.

***Law Change Review***

A review of your plan documents to determine if any important law changes have occurred that necessitate a change or make an amendment advisable. You will receive a recommendation letter with our findings.

***Preparation of Amendments***

A preparation of updates to your legal documents to implement name changes for children and grandchildren, or changes to the persons named as trustee, executor or guardian.

***Phone Consultation***

Unlimited phone consultations with our legal assistants on matters related to your estate and wealth preservation plan.

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