

My wife and I created a Revocable Living Trust while we were still working, then forgot about it. We made some small changes over the years (new home, parents passed, etc.) but realized we needed a tuneup to remember what we had originally established. Carol Montgomery met with us at our home with a checklist of questions to jog memory and intentions. Her suggested updates will make it so much easier for our children to inherit and settle our estate when the time comes. Tiffany Smith then met with us to sign documents and notarize these necessary and common sense changes. Our peace of mind is so much better now, knowing we have made our children's future task legally foolproof.

Thank you, Montgomery & Associates