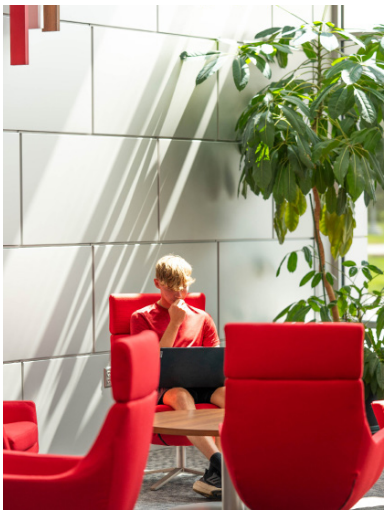
NORTHEAST COMMUNITY COLLEGE
FOUNDATION
Planned Giving Newsletter
Spring 2026

MARCH IS THE PERFECT TIME TO REFRESH YOUR ESTATE PLAN



As the days grow longer and the first signs of spring appear, many people feel a natural urge to get organized. March has become an ideal month to revisit and update an estate plan. There is no legal deadline tied to this month, but it fits perfectly with the seasonal rhythm of renewal and the financial tasks that come with early spring.

Below is why March offers such a strategic window for making sure your estate plan reflects your goals, your family, and your assets.

A Spring-Cleaning Mindset Helps You Spot Gaps

March is a great time to sort through paperwork, organize finances, and clear out clutter. That same mindset makes it easier to review important documents with fresh eyes. Estate plans often contain outdated instructions that go unnoticed until someone takes the time to review.

Early Year Checkups Catch Changes Before They Become Problems

Life rarely stays the same from one year to the next. Events such as marriage, divorce, birth or adoption of a child, a death in the family, or a major change in assets can all require updates to wills, trusts, and beneficiary designations.

A review in March ensures that last year's circumstances do not carry over into the rest of the year.

Tax Season Puts Your Financial Picture Front and Center

Tax preparation requires gathering documents, reviewing accounts, and taking stock of investments and property. March is a convenient time to confirm that your estate plan matches your current financial reality. It is an efficient way to ensure that your asset list is accurate and that your beneficiary designations still reflect your intentions.

New Laws Often Take Effect Early in the Year

Estate tax thresholds, retirement account rules, and other regulations can shift from year to year. By March, any changes that took effect in January are clear and settled. This timing allows you to adjust your estate plan, so it remains aligned with current law.

A Timely Review Reduces Stress for Loved Ones

The most common issue attorneys see is not a lack of planning. It is outdated planning. A quick review in March helps ensure that your documents reflect your current wishes. This simple habit can prevent confusion and conflict for the people you care about.

Making March your annual estate planning checkup month creates a simple and repeatable routine. It is a chance to align your documents with your life, your values, and your goals before the year becomes busy.

ADDITIONAL RESOURCES

To connect with a member of the Northeast Planned Giving Advisory Council, scan the QR code or visit northeast.edu/giving today.

Advice to Grads

Have advice to share with those graduating this year? Email us at foundation@northeast.edu.

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FOUNDERS SOCIETY MEMBERS

Northeast has established the Founders Society to celebrate and thank those individuals who share in the College's dedication to the success of students and the region it serves. The Founders Society is comprised of those individuals who have chosen to include Northeast in their estate plan with a deferred gift for the ultimate benefit of the College and its students.

Planned gifts include bequests in wills or living trusts; life income plans such as gift annuities, charitable trusts, and pooled income funds; and beneficiary designations of retirement plans, brokerage accounts, and life insurance policies.

Anonymous (5)
The late Nina M. Bahm
Kendra Barnes
John & Diana Blaylock
The late LauraNel Carlisle
Dr. Michael & Susan Chipps
Craig & Lori Cook
The late Vern D. & the late Lucille Fairchild
Scott & Angela Gray
The late William J. Hansen
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