

Ducks In A Row Digest



CAROLINA FAMILY ESTATE PLANNING • MONTHLY NEWSLETTER

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What's Inside

Annual Checkup: Is Your Estate Plan Up-to-Date?

Does your plan meet your current goals? Find out now.

A Message From Jackie

Our founder has an important announcement for you! Keep reading to discover more.

10-Minute Couscous Salad Recipe

Enjoy the fresh flavors of spring with this delicious and healthy recipe.

Puzzle Time!

Have fun and challenge your mind with our puzzle, this month we have a spot the difference game!



Congratulations to Jackie Bedard, founder of Carolina Family Estate Planning, for being named “Best Attorney 2023” by Cary Magazine’s Maggy Awards! We are proud to have you as the driving force behind our firm’s success.

We would like to express our gratitude to everyone who voted and made this recognition possible!

Carolina Family Estate Planning

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Annual Checkup: Is Your Estate Plan Up-to-Date?

Did you know your estate plan needs to be “updated” regularly?

Your estate plan is a snapshot of your life the way it was at the time it was created. However, over time, your family structure, assets, and tax laws change. If you don’t update your estate plan to reflect those changes, then you’re using an ineffective plan that can create financial trouble and turmoil among family members.

Our 2023 Estate Planning Check-Up List is a series of questions designed to help you determine whether you need to update your estate plan soon.

The overall outcome you should be looking for: Does your plan meet your current goals?



1. I have a current (2010 or later) Health Care Power of Attorney to permit my spouse, children and/or family to make emergency healthcare decisions for me in the event I am unable to do so.	Yes	No	Don't Know
2. I have a current (less than five years old) Durable Power of Attorney to permit my spouse and/or children to handle my financial affairs in the event I become disabled.	Yes	No	Don't Know
3. I have verified that my Durable Power of Attorney permits my agent to undertake long-term care planning on my behalf if I become disabled.	Yes	No	Don't Know
4. I am satisfied with the persons I named as guardians of my minor children in my current plan.	Yes	No	Don't Know
5. If I have a Revocable Living Trust in place as part of my estate plan, it gives instructions not just for my care but also for the care of my loved ones if I become mentally disabled.	Yes	No	Don't Know
6. I am certain that my current estate plan will minimize possible federal and state estate taxes at my death, including taxes on my house, life insurance, and IRAs.	Yes	No	Don't Know
7. My current plan provides creditor and lawsuit protection for my children’s inheritance.	Yes	No	Don't Know
8. My current plan addresses income tax planning, especially for my retirement accounts.	Yes	No	Don't Know
9. If I own a business, my plan includes appropriate business succession planning and/or asset protection planning to protect my personal assets from my business obligations.	Yes	No	Don't Know
10. If I own a family vacation property, my plan includes a clear plan for preserving the vacation property for future generations.	Yes	No	Don't Know



These are less than half of the questions we ask on our **2023 Estate Planning Check-Up**. Key details are important to include in your estate plan, no matter how big or small. Follow this QR code to answer the rest of our check-up questions or [download from our website now](#).

Reviewing your plan at regular intervals, in addition to major life events, will help ensure that your legacy is passed on, honoring your wishes and that your beneficiaries receive their benefits as smoothly as possible.

If you need help looking at your plan, don't hesitate to get in touch with our office at 919-694-4437 to discuss an Estate Plan Checkup.



A MESSAGE FROM JACKIE

If your schedule is anything like Dan's and mine's, summer vacation planning is underway, and we're excited to head out on a relaxing trip in a couple of months. One thing I always recommend to clients before they head out on their summer vacation is to make sure they have their ducks in a row.

What does 'ducks in a row' look like?

Your ducks in a row can include organizing all important documentation for your Power of Attorney and notifying them of their location, or scheduling a meeting with your estate planning attorney to make updates, or attending one of our upcoming in-person presentations at our office.

The Alzheimer's Planning Center team will be hosting in-office presentations on long-term care planning, care options, and the importance of decision-makers & legal planning.

Alzheimer's Planning Center



Upcoming Presentations:

- May 11 @ 11 a.m.
- May 16 @ 6:30 p.m.
- May 24 @ 11 a.m.

If the times above do not work for you, not to worry, keep an eye out for upcoming email announcements for future dates.

This summer, don't get distracted by that ever-looming thought in the back of your mind if you and your family are protected. Give yourself peace of mind knowing you, your family, and your assets are protected with an updated estate plan.

Jackie

i If you would like to attend one of our upcoming presentations, give the Alzheimer's Planning Center a call at 919-694-4437, or visit our website: www.AlzheimersPlanningCenter.com/contact.cfm

10-MINUTE COUSCOUS SALAD

Spring is the perfect time to enjoy fresh and healthy recipes, like this delicious 10-minute couscous salad. This recipe is a delicious and nutritious meal that you can whip up in no time!

Ingredients:

- 4 oz Couscous
- 1 cup hot low-salt vegetable stock (from a cube is fine)
- 2 spring onions
- 1 red pepper
- ½ cucumber
- 2 oz feta cheese, cubed
- 2 tbsp basil pesto
- 2 tbsp pine nuts

Directions:

1. Tip the couscous into a large bowl and pour over the hot vegetable stock. Cover, then leave for 10 mins until fluffy and all the stock has been absorbed.
2. Slice the onions and red pepper, and dice the cucumber.
3. Add the vegetables to the couscous and fork through the pesto.
4. To serve, crumble in the feta, then sprinkle over pine nuts.



This versatile couscous salad can be served as a side dish (goes great with grilled chicken) or enjoyed on its own. Bon appétit!



SPOT THE 6 DIFFERENCES!

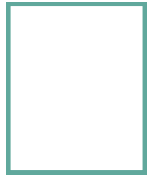
Are you ready to challenge yourself and work on your problem-solving skills? This spot the difference game is a great way to do just that! It requires analytical and critical thinking, which helps keep your brain active and healthy.



Stay tuned for the puzzle answer! Follow us on social media to find out.



@carolinafep
@alzheimersplanningcenter



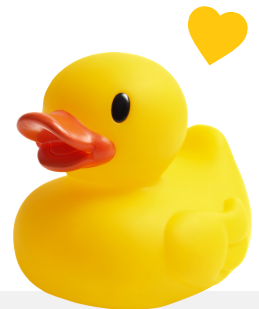
Thank you for your referrals!

We donate a portion of our income from each Estate Plan, Estate Administration, and Memory Safeguard Plan to *Meals on Wheels* of Wake County and the *Dementia Society of America*. When you refer to Carolina Family Estate Planning or The Alzheimer's Planning Center, you can rest assured that not only will they receive the award-winning service we are known for, but that you are helping support two very worthy causes.



Thank You For Introducing Your Friends and Family to Carolina Family Estate Planning!

Ed & Kim Leon
Triangle Smart Divorce, Diane Allen
Tryon Title Agency LLC, Chris Cabaniss
Cary Magazine Business Recognition Award Article
Durham Internal Medicine Associates, Michael Richards MD
Law offices of Lowry & Associates, Steve Lowry
Robert & Samantha Fastenau
David & Emily Glover
Merrill Lynch
Ira Schugar



Discover the steps you should be taking right now to get quality long-term care... without going broke, losing your home, or leaving your family without a dime! Get our FREE book:

The Ultimate Guide To Paying For Nursing Home Care in North Carolina

Download Now!