

# Ducks In A Row Digest



CAROLINA FAMILY ESTATE PLANNING • MONTHLY NEWSLETTER

SEPTEMBER 2023 • ISSUE #9

## What's Inside

### Ladies, Let's Talk

Discover how to overcome the unique challenges that women face when it comes to estate planning.

### Words From Our Clients

Check out what our happy clients say about us. You can leave us a review too!

### What To Expect When Seeing A Neurologist

Here's what you need to know before, during, and after your neurology visit.

### Puzzle Time!

Grab your pen! This month we have a challenging word search game.



## FREE In-Person Seminar: *3 Secrets to Protect Your Family Without Going Broke or Being a Burden*

Discover proven strategies to safeguard your wealth & ensure your family's future.

*Scan the QR code  
to register now!*



### Three Options Available:

- September 12th @ 10:00 AM
- September 13th @ 6:30 PM
- September 14th @ 1:30 PM



## Ladies, Let's Talk: Securing Your Legacy in North Carolina

Hey there, wonderful women of North Carolina! Amidst the hustle and bustle of our daily lives—whether it's chasing careers, nurturing families, or making a difference in our communities—it's easy to forget about planning for the future. But, just like scheduling that long-overdue coffee catch-up, it's essential to make time for estate planning.

Why should women think differently about estate planning? Let's chat about it:

- 1 **Teamwork Makes the Dream Work:** Estate planning isn't just your partner's job. It's a team effort! Both of you should be in the loop.
- 2 **Age is Just a Number:** Think estate planning is only for retirees? Think again! It's never too early to start. Every adult age 18 years or older should have an estate plan in place.
- 3 **Living in the Moment vs. Planning Ahead:** We all love to enjoy the fruits of our labor now, but it's also about ensuring our loved ones are set for the future.
- 4 **The "I'll Do It Later" Trap:** Postponing estate planning or skipping it altogether? That might lead to some unexpected twists down the road.
- 5 **Kids to the Rescue?:** It's lovely to think the kids will handle everything, but it's always best to have a clear plan in place.
- 6 **Revising Your Will:** Grieving the loss of a spouse? It might be tempting to make quick changes to your will, but sometimes, it's good to pause and reflect.
- 7 **New Beginnings:** Changed your relationship status on social media? It might be time to revisit your estate plan too!

So, why is estate planning a tad different for us ladies? Here's the scoop:

- **Outliving Our Partners:** It's a fact: many of us outlive our partners. Let's be proactive and plan for that possibility together.



- **After the Divorce:** Life changes, and so should your estate plan. Let's make sure it reflects your new journey.
- **Single and Rocking It:** Even if you're single or never tied the knot, it's crucial to have a plan in place. Think about the kiddos and your favorite charities!
- **Health First:** With health risks like heart disease, it's essential to have our wishes in writing. Let's chat about a Healthcare Power of Attorney and a letter of instructions.
- **Modern Families:** Blended families bring joy and a bit of complexity. Let's ensure everyone's taken care of, no matter what.
- **The Caregiver's Hat:** Many of us step into caregiving roles. Let's plan for those golden retirement years.
- **Boss Ladies:** To all the business owners out there, let's ensure your business legacy is secure and thriving!

Estate planning isn't just about paperwork; it's about cherishing and protecting what you've built. Life might be pulling you in a million directions, but setting aside a moment to safeguard your family's future is priceless.

Here at *Carolina Family Estate Planning*, we're more than just a team; we're your friends, ready to walk this journey with you. Let's craft a plan that's as unique as you are, ensuring your legacy shines bright for generations to come.

### WORDS FROM OUR CLIENTS:



Debra M. / Raleigh, NC

★★★★★ June 2023

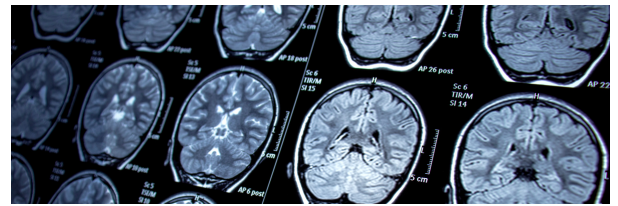
*"I found Carolina Family Estate Planning very thorough and efficient in helping you put together your estate plan. They explained everything and answered all my questions. I was very pleased with the entire experience."*

**Review us in Google!** Scan the QR code and tell us about your experience. We appreciate your feedback ❤️



# REALISTIC EXPECTATIONS WHEN SEEING A NEUROLOGIST

If you are preparing to visit the neurologist with a loved one that may have a cognitive impairment, it's important to prepare yourself and your loved one ahead of time. Setting realistic expectations before you go makes you more likely to leave feeling hopeful instead of frustrated.



Here are some tips to help you prepare to visit the neurologist with your loved one:



**You probably will not get an answer on the first visit.**

Don't expect a diagnosis on the first visit. This may seem frustrating, but the doctor needs time to be sure and run some tests, like blood work, imaging, or a psychiatric evaluation. These tests can take a while to be scheduled and get the results.



**Prepare to be asked lots of questions, and always bring a notebook.**

The doctor will ask many questions to get a complete health history. Fill out any forms or online surveys before the appointment, if possible. This will save time and help the doctor review the answers in advance. The doctor may have a lot of information to share that's riddled with medical jargon, so make sure to bring a notebook so you can take notes as needed and help track your loved one's progress.



**Prepare your loved one for an involved physical exam.**

The doctor will do some physical tests to determine if the brain and nervous system are functioning properly. This may involve touching the patient's face, asking them to push or pull, or checking their reflexes with a soft rubber hammer. Some people may not like this, especially if they are agitated. You know how to prepare your loved one best!



**What should I do next?**

We have helped many family members in your shoes at the Alzheimer's Planning Center. We understand the difficulties you're encountering with your loved one as they accept they need help and for you as a relative that only wants the best for them. Our goal is to relieve stress by mapping the way through for you. Give us a call at 919-694-4437.



## A MESSAGE FROM JACKIE

It feels like just yesterday we were welcoming spring, and now here we are, gearing up for cozy sweater weather. As the leaves start to change, it's a gentle nudge from Mother Nature herself to think about the changes and plans in our own lives.

Speaking of changes, guess what's back? Our in-person estate planning seminars! 🍂 We've heard you loud and clear, and we're thrilled to bring back these sessions. So, grab a cup of pumpkin spice latte (or your favorite fall drink) and join us as we come together to learn and share insights.

Got a story to share? We'd love to hear it! Your journey, your experiences, and your voice are what make our community so special. If you're up for it, we'd be honored to feature your testimonial on our website.

Who knows? Your story might just be the nudge someone needs to start their own estate planning journey. Just give our friendly team a ring at 919-694-4437 and say, "Hey, I've got a story to tell!"

As the world around us transitions to the vibrant colors of autumn, let's embrace this season of change, empowerment, and togetherness. Keep an eye out for all the exciting updates and events we've got lined up for you.

Stay cozy, stay connected, and let's make this fall unforgettable! 🍁

*-Jackie*

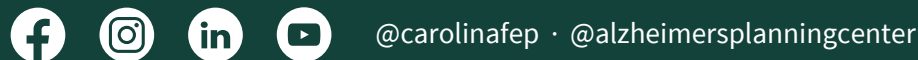
## WORD SEARCH GAME!

Are you ready to challenge your mind and improve your problem-solving skills? Then grab your pen and dive into our Word Search puzzle! This game is not only fun but also good for your mind. Word search puzzles keep your brain fit and healthy by stimulating different areas of cognition.

We've hidden 15 words, see if you can find them all! Good luck!

- Autumn
- Estate
- Probate
- Executor
- Apple
- Legacy
- Harvest
- Leaf
- Equinox
- Planning
- Family
- Trust
- Beneficiary
- Pumpkin
- Will

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





# Carolina Family Estate Planning

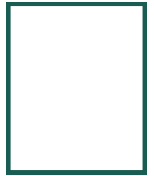
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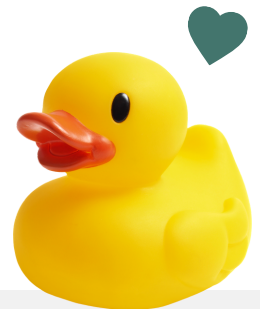
## Thank you for your referrals!

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!

Law Offices of Lowry & Associates, Steve Lowry  
Durham Internal Medicine Associates, Michael Richards MD  
Real Estate Attorney, Joel Ledbetter  
Whitley Law Firm, Bob Whitley  
First Command, Nick Putnam  
Beth Black  
Dana Davis  
Lisa Banks  
James Woods  
Kim King  
Jaime Rudd  
Robert Wood



Get a **FREE** Guide for North Carolina Executors and Trustees Navigating the Probate Process:

## ***Understanding Estate Administration***

• Scan the QR Code and Get Your Copy Now! •