

Get Your Ducks in a Row!

Estate & Long-Term Care Planning News
from Carolina Family Estate Planning

August 2018

The Power of Yes

"We're leading a mission trip in Haiti in a couple weeks. We could really use someone with your skills. What do you think? Would you like to join us?"

The pastor was paying me a huge compliment. Not only was he saying that my skills were useful, but he was saying he could trust me to work well and gracefully under stressful conditions. I really wanted to go. So how did I respond?

"That sounds great. Let me check my work schedule and get back to you tomorrow."

By the time I checked my work schedule, it was too late. The trip was fully booked. I guess they found someone else who had the skills I would have brought. I never went on a mission trip. I never went to Haiti.

The thing is, I knew my work schedule wasn't that full. When I thought about it, I knew I could move appointments around if I had to. My gut had told me to just say yes and figure out the details later.

This was the kind of "leave everything behind and follow me," experience I was told about. I ignored my gut.

Fast forward to last year, when my friend Bill invited me to join him on the "Thin Places of Ireland" trip. When he asked if I'd like to go, I didn't hesitate to think about how I would make it work. I just said "yes" and determined to figure it out later. I won't get into it here, but it got pretty complicated to figure out. But it has proven to be an important experience, and I am still learning and benefiting from the trip.

A couple weeks ago, I heard through the grapevine that an acquaintance of ours had passed away. I met Josh for the first time last December. Nice guy. Snappy dresser. In the past few months, there were half a dozen times when I had the opportunity to sit down and talk with Josh and get to know him better. But I didn't take those opportunities. I guess I just figured I would always have more chances.

Maybe there's something in your life right now that you've been on the fence about. Something that has made you want to procrastinate. Maybe you've been putting off calling an old friend because you knew you would need hours to catch up. Or you've put off taking that vacation you've planned for the last ten years.

I want to encourage you to get off the fence. Say, "Yes, I will," or "No, I won't," but stop waiting for the decision to make itself and be intentional about your life. We never know when our time will come. But we know we don't have forever. If your gut is telling you to say "yes," please listen to it. Say yes. Figure it out later. And live life better. Now.

Dan Bedard is Executive Director of Carolina Family Estate Planning. When he's not learning how to say yes, he can be found creating and honing systems, running, or traveling.



Carolina Family Estate Planning

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It's Never Too Late to Re-Resolve...

New Year's was officially 7 months ago. Jackie and I just celebrated our 13th wedding anniversary. This is the year that we vowed we would be in the best shape of our lives, and we would put more of our earnings into charity than we ever had before.

How's that working out, you ask? Well...my first reaction is to be a little embarrassed. On the surface, we're in the same place we were at the beginning of 2018.

Maybe you can relate: The hopefulness of writing down your weight loss and exercise goals, your resolution to work on a project or a relationship, your determination to embark on a new journey of discipline or to establish rhythms of rest and time away... resolution-making can be intoxicating. It is a hope-filled business.

But, often, life circumstances intrude. It has been a challenging year. But when I take a second look, I realize we have made some real progress. Jackie is on a new diet that's going very well, and through a customized workout program, her knee, which had been giving her problems for the greater part of the past five years, is better now. Goaded on by a friend, I have registered for my first half marathon in 5 years. I've dusted off the old training schedule, and in doing so, I am still planning to get in the best shape of my life.

And as painful as revisiting those resolutions has been, my shame, in combination with some surprising encouragement, has also led us to new action. Another re-start.

Realizing where we are in the year, we have now caught up on our donations, and now we have donated more in 2018 than in any other prior year. Re-resolving, painful as it seems at first, can spur us on. Who says we can't restart in August? In fact, many of us are programmed to change our routines as the school year begins. So be brave and push through the shame. There's hope on the other side.

Dan Bedard is Executive Director of Carolina Family Estate Planning. His latest re-resolving was recharged on a trip to Ireland. Check out Dan's adventures at vip.carolinafep.com/Ireland2018

thank you **For introducing your Friends and Family to Carolina Family Estate Planning!**

We're devoted to delivering first-class service to our clients. As a result, our valued clients, partners, and friends refer their friends, family, and associates to us.

- Cary Senior Center**
- Ralph & Kathie Clemons**
- Ashley Crane**, First Command Financial Services
- Lori Kenemy**, Brightstar Care of Cary
- Doug & Nancy Ladish**
- Helayne Levy**, Elder Law & Life Care Planning Center
- Lucy Nottingham**
- Ray Stancil**, Brookdale Cary
- Herb Teitelman**
- Carol Whitmire**, Brown-Wynne Funeral Home



“ We were very pleased with Jackie and her team in helping us prepare a comprehensive estate plan. They made us feel extremely comfortable throughout the process and no questions were off limits. We recommend CFEP to anyone in need of a good estate plan. ”

LEW & ARLENE
CARY, NC

Asian Style Pork Burgers

For our Summer's Last Stand Recipe, check out foodandwine.com

Ingredients:

- 1 1/2 lbs ground pork
- 2 scallions, thinly sliced
- 1 teaspoon finely grated fresh ginger
- 1 large garlic clove, minced
- 1 1/2 teaspoons sesame oil
- Kosher salt and freshly ground pepper
- 4 hamburger buns, split
- 2 cups coleslaw mix
- 2 teaspoons rice vinegar
- 1 teaspoon soy sauce



Instructions:

- 1) Light a grill or preheat a grill pan. In a large bowl, mix the pork with the scallions, ginger, garlic, 1 teaspoon of the sesame oil, 2 teaspoons of kosher salt and 1/2 teaspoon pepper. Form the meat into four 3/4-inch thick patties.
- 2) Grill the burgers, turning once, until cooked through, about 8 minutes. Lightly toast the buns on the grill.
- 3) Meanwhile, in a medium bowl, toss the coleslaw mix with the rice vinegar, soy sauce and the remaining 1/2 teaspoon of sesame oil. Season with salt and pepper. Set the burgers on the buns, top with the slaw and serve with sriracha and mayo.

Nala's Nook

Nalsworth Dogglethorp, III, Esq. here
(but you can call me 'Nala').
I'm bringing a little fun to my corner.
After all, it's still summer, folks!



**IT'S BAAAACK...
THE SUMMER VACATION
PEACE OF MIND DISCOUNT!!**

**\$100 OFF WILL-BASED PLANNING
\$250 OFF TRUST-BASED PLANNING**

- Discount applied at your document signing meeting.
- Your document signing must occur by September 14, 2018. You'll have 2-4 meetings, so don't wait to schedule. **CALL NOW!**
- Cancellations or rescheduling of meetings will result in forfeiture of the discount.

**Need to know more?
Give us a call at 919-694-4437.**

Planning for the Second Half of Life in These
Political and Economic Times...

11 Threats to You, Your Family, and Your Assets

AT THIS SEMINAR, HERE'S SOME OF WHAT YOU WILL DISCOVER:

- How to avoid the common mistakes Baby Boomers make when planning for the second half of life.
- How to avoid having your life savings or retirement plans wiped out by the cost of care as you get older.
- Uncover the secret sources of paying for long-term care costs that may lie hidden in your retirement plan.
- Important differences between Estate Planning and Long-Term Care Planning and how they coordinate.
- How to care for yourself and your spouse and how to maximize the assets you leave to your children...plus how to protect their inheritance from divorce, less-than-trustworthy spouses, creditors, and other wealth wasters.

Upcoming Free Seminars (RSVP Required):

Wednesday, August 15 10 am • Thursday, August 23 6:30 pm
Thursday, Sept 6 6:30 pm • Wednesday, Sept 19 10 am

Register by Phone: **919-694-4437** or at **seminars.carolinafep.com**

*Can't attend? Call us! Additional dates may be offered upon demand.
We'll keep you apprised of future offerings or other resources to assist you.*

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What's New at Carolina Family Estate Planning?

- We welcome our newest member of the Team, Renetta Carroll!
Renetta comes to CFEP after years working in activities programs at several area assisted care communities. Considering her organizational skills, natural empathy, and years of experience working with people of all ages from diverse backgrounds, plus a solid, hard-earned knowledge of the health care industry, we knew Renetta would be a perfect fit for our Client Welcome Specialist position. Renetta lives in Apex with her husband, Landon, and daughter, Peyton. When she isn't chasing after Peyton or carting her off to gymnastic events, she gardens or heads for the beach.
- Rock star Client Welcome Specialist Amanda Keiffer just celebrated 1-year serving clients at CFEP on July 31. Congrats Amanda, and we can't wait to meet baby Caleb (Pssst, Amanda is due any day now!)
 - Understanding Estate Administration is a hit! We have had well over 100 requests since first publishing it last month. Curious about probate and trust administration? Get your copy at vip.carolinafep.com/UnderstandingEA
 - **Lorraine Davis is a grandma! Savannah Ruby is here and ready to be spoiled by her G-ma! Congratulations to the Davis family!**

