

Ducks In A Row Digest



CAROLINA FAMILY ESTATE PLANNING • MONTHLY NEWSLETTER

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Happy New Year!

Carolina Family Estate Planning

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New Beginnings! What Will You Start With the Time You Have?

All of us experience new beginnings regularly. Some new beginnings happen by choice. For example, you might have made some New Year's resolutions to plan a trip you've always wanted to take, create a new budget, or cook new recipes. My New Year's resolution is to "unplug" — spend less time on my phone and doom scroll. I've turned off all my notifications on my phone and computer so I can work uninterrupted, be more productive, and use my downtime on more engaging and enjoyable activities. Our newsletter's new look might be considered a new beginning as well!

Other new beginnings, however, come upon us unexpectedly: a new diagnosis, the death of a loved one, an injury, or a disability. A close friend's mother was recently diagnosed with Alzheimer's, and now she and her siblings have to grapple with the "new beginning" as caregivers and making medical decisions. Her grandchildren now face the "new beginning" of their grandmother forgetting who they are.

Things can change in an instant, whether we want them to or not. We all think we have more time, and the reality is that it's our most precious, limited resource. All of us have 24 hours a day to spend. If there are any new beginnings you've been postponing because you believe you'll "just get to it later," ask yourself: What's holding me back from starting now? Of course, that might not apply to the new beginnings thrust upon you. However, you can make the proper preparations by crafting a detailed estate plan so your loved ones will be able to easily sort through the inevitable legal and healthcare issues that will arise. Don't add additional stressors to an unexpected "new beginning."



If you're already a client of ours and you have an estate plan in place, congratulations! Now all you need to do is make sure it's up to date now and then (We recommend every three years or when a big life event happens). If you don't have an estate plan, however, why not start one now? You can take charge and enter a new beginning where you have protected yourself and your family from the inevitable. What's stopping you from taking action? **Our team is ready and waiting to make that process as easy as possible. Call us at 919-694-4437 or email us at Welcome@CarolinaFEP.com and we'll help you get started.**

- Jackie

BIG LIFE EVENTS

- Acquired new assets
- Welcomed a new member to the family
- Lost a loved one
- Separated or divorced
- Been diagnosed with a debilitating or terminal disease
- Made adjustments to your business
- Relocated across state lines



TOO COLD TO GO OUTSIDE?

Here's a list of our favorite indoor activities:



**Watching a
Netflix show**



Cooking



**Playing games
with the family**



Reading



**Scheduling a meeting
to start your estate
planning process!**

MEMORY SAFEGUARD PLANNING

We help families create plans to preserve the dignity and well-being of loved ones impacted by memory loss and dementia.

The Alzheimer's Planning Center is a special division of Carolina Family Estate Planning devoted to helping individuals and families impacted by cognitive impairment, dementia, and Alzheimer's disease live their best lives possible through our unique Memory Safeguard Planning.

How can Memory Safeguard Planning help you?

Memory Safeguard Planning is composed of three parts created especially for you and your family that fulfill your dreams and goals and will protect you and your family for life.

- **Care plan:** An assessment of the social, family, and medical information to create a strategic plan to meet your needs
- **Legal plan:** Estate planning, healthcare power of attorney, wills, and trusts, and other items to ensure you take the best care of your loved ones
- **Financial plan:** An assessment to find the best solutions to fund long-term care



SUDOKU

Although playing 'brain games' may not prevent dementia, it has been shown that regularly challenging yourself mentally seems to build up the brain's ability to cope with mental diseases.

Sudoku is played on a grid of 9 x 9 spaces. Within the rows and columns are 9 "squares" (made up of 3 x 3 spaces). Each row, column, and square (9 spaces each) needs to be filled out with the numbers 1-9, without repeating any numbers within the row, column, or square.

Alzheimer's Planning Center

AT CAROLINA FAMILY ESTATE PLANNING

4	3							
5	9		8			3	2	
		8		5		9		4
9	8	2				1	4	
	1	5	3	8		2		9
3	7	4	2	1				6
8						4		2
2	5		4			6	3	8
1		3		2		7	9	

A MESSAGE FROM JACKIE

Happy New Year! As I look back on 2022 and reflect, there were some incredible highs like our vacation to Hawaii and a bucket list trip to Canada to see the Northern Lights and explore Banff. Plus growing our incredible team at CFEP, expanding APC, and achieving an all-time high of how many families we helped.

With the high there were some lows, Nala went over the rainbow bridge in November and Dan and I lost two friends. One to a grueling fight with pancreatic cancer and the other to an overdose after a lifetime of battling addiction.

To those who lost loved ones in 2022, going through the first holiday season without your loved one is hard. We hope you were able to find some peace in reflecting on cherished memories.

2023 is shaping up to be an exciting year! We have big plans to expand our services in both CFEP and APC, plus Dan and I are planning trips to Paris and Yellowstone. We're excited you're embarking on this journey with us in 2023.



Jackie

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!

Triangle Smart Divorce, Mitzi Gardner
Durham Internal Medicine Associates, Michael Richards MD
First Command, Nick Putnam
Titsworth Law Offices, PA, Gwin Westenbarger
TIAA Financial Services, Ryan Mathis
Bankers Life, Jason Brock
Law Offices of Lowry & Associates
Edward Jones - Financial Advisor, Maria Litzinger
CPA, Lydia Jensen
Ben Mount
Linda Fineman
Christie Malcolm
Darlene & Wolfgang Cernoch
Mary Toland



Great news! We have a NEW & FREE webinar available:
3 Secrets to Protect Your Family Without Going Broke or Being a Burden

· Register now, spots are limited! ·