

Ducks In A Row Digest



CAROLINA FAMILY ESTATE PLANNING • MONTHLY NEWSLETTER

JULY 2023 • ISSUE #7

What's Inside

Avoid Common Estate Planning Pitfalls

Don't let these common mistakes ruin your estate plan. Learn how to avoid them and protect your legacy.

Strawberry Frozen Yogurt Recipe

Looking for a delicious and refreshing treat to beat the summer heat? Try our recipe, ready in just 5 minutes!

Communication Tips for Dementia Caregivers

Learn how to communicate with your loved one despite their dementia. Inside are tips to help you.

Puzzle Time!

Get ready for some fun with our puzzle! This month we have a maze game; we call it "The Probate Maze."



The Virtual Dementia Tour

We are very thankful to our partner **Spring Arbor of Cary**, for their collaboration and support in hosting the Virtual Dementia Tour. This free event gave participants a chance to experience the cognitive challenges that people with dementia face every day.

The Alzheimer's Planning Center has more events coming up, so stay tuned!



Alzheimer's Planning Center
AT CAROLINA FAMILY ESTATE PLANNING



How You Can Avoid the Most Common Estate Planning Pitfalls

Creating an estate plan is one of the most important things that you can do to protect your legacy for your family. However, when you create an estate plan, there are pitfalls you need to avoid. These pitfalls can affect the outcome that you're using your estate plan to accomplish.

Ensuring that you understand some of the most commonly seen estate planning pitfalls will help you avoid making them. After all, being aware of mistakes other people make gives you the chance to learn from them and do what's best for you and your family.

Pitfall 1: Not Having An Estate Plan

One mistake that people make is not having an estate plan. An estate plan details how you want things like your finances or your healthcare handled if you're unable to make your own decisions. A comprehensive estate plan can even have a plan for if you're unable to take care of your children that details who should care for them and what values you want your children raised with.

Pitfall 2: Failing To Remove Beneficiaries

Many married couples name one another as the beneficiary and executor of their estate. However, if your marriage ends in divorce, then it's recommended to remove your former spouse as a beneficiary and fiduciary. By removing them from your estate plan, you can ensure that your estate will be distributed properly.

Pitfall 3: Failing To Add Beneficiaries

Life-changing events serve as a reminder for you to review and update your estate planning documents and beneficiaries. If you've had a new child or grandchild and want to leave them something, you'll need to update your estate plan's list of beneficiaries to ensure they receive their inheritance without error.

Though we can never predict when life-changing events will take place, it's our firm's job to work together and forecast how your situation and the law may change in the coming years or decades. As a result, most estate planning documents are written to account for future descendants.



Pitfall 4: Hiding Your Estate Plan

You might hear that you should put your will and estate planning documents in a safe place, however many people interpret this to mean that they should hide their documents. This can have a disastrous outcome because if nobody can find your estate plan, then they cannot use your plan if you are incapacitated.

Besides the copy your estate planning attorney has in their records, it's good practice to make another copy and give it to your Power of Attorney or named executor. This ensures that someone that you trust knows where the documents are and lessens the risk of losing your estate planning documents.

If you'd like more information, download our free guide, "Estate Planning Pitfalls & How to Avoid Them" by scanning the QR code below. And if you think your estate needs to be updated, you can schedule a free needs assessment call with our team at 919-694-4437.



STRAWBERRY FROZEN YOGURT

Beat the summer heat with a bowl of strawberry frozen yogurt! This recipe is so easy and quick; you only need 4 ingredients and 5 minutes to make it, plus it's healthy and natural. Try it out!

Ingredients:

- 4 cups frozen strawberries
- 1 cup Greek yogurt
- 2 tbs. honey
- 1 tbs. lemon juice

Directions:

1. Add all the ingredients into a blender or food processor and blend until smooth to a desired consistency, about 4-5 minutes in the food processor or 30 seconds in the blender.
2. You can either serve the frozen yogurt immediately or, if you prefer, transfer it to an airtight container and freeze it for 15-20 minutes until it's firm enough to scoop.



This recipe is a base for any frozen yogurt flavor. Experiment with other frozen fruits, like blueberries, cherries, blackberries, bananas, peaches, and mangos.



COMMUNICATION TIPS FOR DEMENTIA CAREGIVERS

Good communication is an important part of any relationship. When caring for a person with dementia, the ability to communicate becomes more and more difficult. The ability to express needs and process information becomes impaired. The inability to communicate needs and process the world around them can be frustrating. That frustration can manifest as agitation, anything from pacing to lashing out. As caregivers, we want to prevent this reaction as much as possible by communicating effectively and allowing the person time to process and respond. Here are some tips to help you:

✘ NEVER	✔ INSTEAD
<i>Argue</i>	<i>Agree</i>
<i>Reason</i>	<i>Divert or Change Subject</i>
<i>Shame or Embarrass</i>	<i>Distract</i>
<i>Lecture</i>	<i>Reassure</i>
<i>Say "remember"</i>	<i>Reminisce with Them</i>
<i>Say "I told you"</i>	<i>Repeat or Regroup</i>
<i>Command or Demand</i>	<i>Ask or Model the Behavior</i>
<i>Condescend</i>	<i>Encourage or Praise</i>
<i>Force</i>	<i>Reinforce</i>



Taking care of a loved one impacted by Alzheimer's or dementia can be overwhelming, but you are not alone; we are here to help. Give the Alzheimer's Planning Center a call at 919-694-4437.



A MESSAGE FROM JACKIE

The Carolina Family Estate Planning team is pleased to welcome our two new attorneys, Lauren Z. Quaas and Daniel Jenkins. They bring years of experience to the firm that will help our clients in areas of estate planning, estate administration, long-term care planning, and estate management.

Lauren joins the CFEP team with an impressive and passionate background; She earned her Bachelor of Business Administration (BBA) degree in Finance and Marketing at the University of Iowa's Tippie College of Business and with a desire to make a difference in people's lives, she pursued her legal studies at Elon University's School of Law, obtaining her Juris Doctor (JD). One of Lauren's notable achievements is her certification as a Dementia Certified Practitioner (DCP) from The Elderlaw Firm, showcasing her expertise and commitment to serving clients dealing with dementia-related issues.

Lauren is an active Young Lawyers Division (YLD) member of the Greensboro Bar Association and joins the CFEP team with three years of experience in long-term care planning and estate management. Lauren thoroughly enjoys watching and playing sports and loves to bake for her family.

With over 15 years of experience in estate planning and estate administration, Daniel joins the CFEP team with dedication and commitment to his clients to make a positive impact on their lives. Daniel earned a Bachelor of Science in Finance from Clemson University before pursuing a Juris Doctor (JD) from Wake Forest University School of Law. He further honed his expertise by earning an LLM in Tax from the University of Washington School of Law. Outside of work, Daniel enjoys reading and playing board games, constantly seeking new challenges and strategies. Daniel actively volunteers his time to charitable causes.

-Jackie

PUZZLE TIME: THE PROBATE MAZE

Welcome to Puzzle Time! In this month's edition, we have a maze game that will challenge your navigation skills. For this game, you need to find your way out of the complex maze that represents the legal steps and procedures involved in settling an estate. Are you up for the challenge?

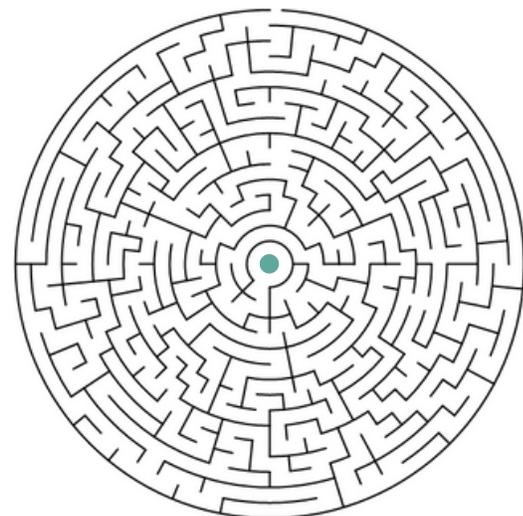
Remember: there's no need to handle probate all by yourself. Carolina Family Estate Planning can guide you through every stage of probate, ensuring that everything is done on time and correctly.

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





 @carolinafep · @alzheimersplanningcenter





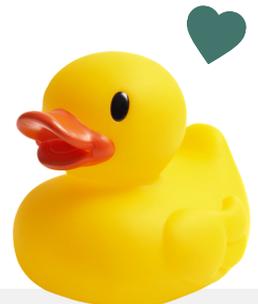
Thank you for your referrals!

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!

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



If you or a loved one have been diagnosed with Alzheimer's, if you are currently a caregiver, or if you are generally concerned about your risk for developing this disease, then our **FREE** book is for you:

A Guide to Alzheimer's Care

Scan the QR code and download now!