

Get Your Ducks in a Row!

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

January 2019

Listening for a Legacy

When I was in high school, we had a semester-long family history project that included researching our family tree and interviewing our eldest relatives. When it came time for me to do the interview for my project, I headed over to my Great Aunt Bertha's. At the time, she was 101 years old. She was the oldest resident of Massachusetts, and she ultimately lived until just shy of her 110th birthday!

When I interviewed her, Aunt Bertha was living independently in the same home she had lived in for years, still doing her own housework and baking fresh bread. When we sat down to talk, she shared wonderful stories, rich with history, as she had lived through multiple wars, witnessed the invention of cars and airplanes, and more. It was an amazing experience I will never forget, and it was wonderful to be able to share the recordings with my other family members.

Now, years later, I can't tell you how often clients and friends who visit our office tell us about listening to an old saved voicemail over and over, just to hear their loved one's voice one more time.

Rather than leaving your family with a voicemail that could get deleted, why not leave a more meaningful, intentional message? With today's technology, this has become easier than ever.

Carolina Family Estate Planning

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Using your phone or a digital recorder, record your stories, memories, values, and messages for loved ones. Then download them and store them in a safe location. Consider backing them up to a cloud-based storage service such as Dropbox, Google Drive, or similar. Not tech savvy? Don't have a smartphone? (We love our flip phone club!) Don't panic: ask a family member or friend to assist you.

Struggling with what to talk about? NPR's StoryCorps can help. StoryCorps was founded "to preserve and share humanity's stories in order to build connections between people and create a more just and compassionate world" by traveling around the country capturing people's stories.

While you might not be ready to publicly record your story with StoryCorps, they provide tools on their website to help anyone preserve and share their own story with the audience they choose. Those tools include a great list of questions to help start the conversation at storycorps.org/participate/great-questions. You will probably want to jot down a few notes before you start recording.

A word of caution: you may feel uncomfortable or embarrassed at first. It's normal to feel anxious about public speaking or being on video. Push through. This is a gift for your dearest loved ones. The listeners have already seen you at your best and at your worst, through your ups and your downs. The recording will mean so much to your family that it's worth pushing past the discomfort. And of course, today's technology makes it easy to start over if you really goof! And if the words aren't flowing smoothly that day, or you're just not in the right mood, you can always try again tomorrow... Just don't put it off indefinitely. Make it the priority it deserves to be.

"Inside each of us is a natural-born storyteller, waiting to be released."
-Robin Moore, Author

Jackie Bedard is the founder and senior attorney of Carolina Family Estate Planning. She loves hearing good stories and serving CFEP clients with comprehensive estate planning services.





Nelly: A Tribute to a Great Dog

I have to admit that when I was writing my end-of-the-year article last month about nostalgia, I was preoccupied thinking about something that I wasn't ready to write about yet: our dog Nelly.

I first met Nelly at a truck stop in Pennsylvania in the fall of 2002. I lived in Virginia at the time. Our neighbor to the house I grew up in in Michigan had bred her dogs, and after discussing with my mom, she had paid for a chocolate Labrador Retriever—the runt of the litter—on my behalf. My mom and I met at the halfway point in Pennsylvania to exchange cash and dog.

For me, it was love at first sight. For Nelly, it was probably pretty scary. She was so timid and didn't yet have the leash skills to walk with me to my car—or to “do her business” before getting in the car, as I would discover during the drive home.



But I would soon learn that Nelly was the most trainable dog I have ever met. I didn't bother to pursue anything as advanced as field training or agility, but by the time she was six months old, she had a repertoire of tricks and I could walk her off leash with no concerns about her running off—at least unless she found muddy water to play in.

Nelly's trainability came from an eagerness to please. Jackie and I often joked about her “furrowed brow,” as she appeared genuinely concerned with making sure everyone was happy and comfortable at all times. I'm told she is the reason several of my friends have their own dogs today, inspired by Nelly's warmth, loyalty, and seeming optimism.

After Nelly came through a major surgery last year, we considered our remaining time to be “bonus time.” We tried to get every bit of enjoyment we could out of it. If pressed, I would tell you it was not her best year, nor mine. But as I consider this today, I realize that every day we have with our loved ones is “bonus time,” a gift—of both joy and sorrow—that we can choose to enjoy for what it is.

On December 3rd, we had to say goodbye to Nelly. If you're not a dog person, this probably sounds silly, but I learned a lot from her during her fifteen and a half years, and I am a better person because of her. I could not be more thankful for the time we were gifted with. She was such a good dog.

- Dan

Executive Director
CFEP



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.

Alex Bartol, Legacy Wealth Strategies

Don & Venita Bowden

Chris Cabaniss, Western Wake Law Group

Paul Delaney, CFA, Capital Endurance Group

Roger Edwards

Marc Gilfillan, W. Marc Gilfillan CPA

Tom Gervase, Coastal Wealth Management

Jason Jonczak, Edward Jones

Joel Ledbetter, Ledbetter & Titsworth, P.A.

Joe Malfeo, Command Capital

PJ & Nicole Neary

Thomas Schaffer, New York Life

Mike Williams

Jaclyn Wilson, Coastal Wealth Management



JANUARY

in history

- 1 In 1892, Ellis Island opened in New York Harbor. Over 20 million new arrivals to America were processed until its closing in 1954.
- 5 Nellie Tayloe Ross of Wyoming became the first female governor inaugurated in the U.S. in 1925.
- 8 Elvis Presley was born in Tupelo, Mississippi in 1935. Elvis purchased his first guitar just eleven years later.
- 11 In 1755, Alexander Hamilton was born in the British West Indies. A founder of the United States who favored a strong central government and co-authored the Federalist Papers, Hamilton died from a gunshot wound received during a duel. Of course, if you're familiar with the insanely popular musical, this is all old news.
- 25 In 1961, President John F. Kennedy conducted the first live televised presidential news conference, five days after taking office.
- 31 Jackie Robinson, the first African-American to play professional baseball, was born in Cairo, Georgia in 1919. He played for the Brooklyn Dodgers from 1947 to 1956, was chosen as the National League's MVP in 1949 and elected to the Baseball Hall of Fame in 1962.

Courtesy of thehistoryplace.com

Looking for a Professional Referral?



We can help! Ask us about our Team 100 list of professionals, including attorneys from other practice areas, financial advisors, and insurance professionals. We'd love to connect you with competent, trustworthy professionals in the greater RTP area.

Got a recommendation? Let us know. We are always looking for great new additions to our list.



My wife and I had talked for some time about the need to update our will. I came across CFEP's website and was blown away by all of the information they offered free. I initiated our first appointment and realized these people offer a unique approach to developing an estate plan. They have a process to guide you to completion. Every detail is discussed with professionals.



TOMMY
FAYETTEVILLE, NC

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, February 13 10 am • Thursday, February 21 6:30 pm
Wednesday, March 13 10 am • Thursday, March 21 6:30 pm

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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inside this issue:

Page 1

Listening for a Legacy

Page 2

Nelly: A Good Dog & Thank-Yous

Page 3

Nala's Nook, Referrals & Review

Page 4

Congratulations!

Thank You!

FOR VOTING CAROLINA FAMILY ESTATE PLANNING
BEST ATTORNEY IN WESTERN WAKE COUNTY!



Jackie Bedard and Carolina Family Estate Planning have won
Cary Magazine's Maggy Award for Best Attorney in Western Wake.

This is our *FOURTH* year in a row as a winner or runner up in the competition.
Thank you to our amazing CFEP Team, to our fabulous clients, and to all who voted!