

# Get Your Ducks in a Row!

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

March 2019

## A HUMBLING CALL TO ACTION DEMENTIA, ESTATE PLANNING & A BETTER LIFE

### "So what is it you really sell?"

"What is it you really sell?" is a question my mentor asks me from time to time. In a place and time where so much can be purchased instantly online, in a metro area that hosts hundreds of law firms, how do we justify our existence? What are we about? What is it that we uniquely offer people?

It would be easy to say we provide documents. And, really, that's what most of the continuing legal education (CLEs) available to lawyers is about: how to be a better lawyer. I'm not going to shy away from this: I am a great lawyer. I hire great lawyers. And I believe our plans and processes are more thorough than any other firm or attorney I've seen.

Frankly, any lawyer who doesn't think that about their firm probably shouldn't be doing what they're doing.

So, back to the question, what are we about, really?

From Day One, I set out to do things "a certain way" in our firm, but I hadn't had to explain it until my mentor asked. I was left without the words to explain the joy I've always brought to what I do. Dan and I argued about the answer to this question for weeks on end. At one point, we had a 42-word paragraph describing what we do. Finally, we arrived at a simple answer for what we seek to provide: **a better life.**

I was reminded of how we struggled for that answer last month when we were in a hotel ballroom in Orlando,

### Carolina Family Estate Planning

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#### Practice Areas:

Wills • Living Trusts • Asset Protection Planning  
Powers of Attorney • Health Care Directives • Living Wills  
Long-Term Care Planning • Medicaid Planning  
Veteran's Aid & Attendance Benefits  
Special Needs Planning • Children's Safeguard Planning  
Probate & Estate Administration • Trust Administration

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Florida for the first ever summit of the National Alliance of Attorneys for Alzheimer's Planning (N3AP). N3AP was founded to help attorneys identify ways to help people affected by this devastating disease. And if I had to describe the summit in one word it would be this: **humbling.**

*Humbling* because on the first day, a presenter asked everyone to stand who had lost a close friend or relative to Alzheimer's, Parkinson's, Lewy body or any other form of dementia. Every single person in the room stood up.

*Humbling* because we were reminded of how far the impact of dementia reaches beyond the person who was diagnosed: the toll of caregiving shortens the life expectancy of the caregiver by several months on average.

*Humbling* because we realized that there is more we can do to help.

To further our mission of helping people live better lives, we are doubling down on our commitment to help those affected by Alzheimer's and all cognitive impairment disorders.

Already, we have been investing in training our team on how best to provide compassionate care and counsel to clients who have recently received a terminal diagnosis, as well as their caregivers and family members.

We are also continuing to develop new planning techniques, questions to ask, and provisions to include in clients' plans. For example, if you're a caregiver and something happens to you, how can we ensure continuity of care for the person you're responsible for?

And we are continuing to develop new connections in our community, because legal planning is only one piece of the puzzle. We feel we are in a unique position to help coordinate a team of providers for our client families.

Over the coming months, we will share additional details of our plan with you. In the meantime, please tell us your ideas for how we can help you and your family. Send us an email at [Newsletter@CarolinaFEP.com](mailto:Newsletter@CarolinaFEP.com)

Call us at 919-694-4437.  
Helping people live better lives isn't just a slogan to us.

**It is our purpose.**



Founder and Legal Strategist of  
Carolina Family Estate Planning.



# New Additions to the CFEP Team!

Welcome to our newest Estate Planning Manager, Heather Blanchard! Heather originally hails from Ahoskie, a small town in eastern North Carolina. She adds a unique and special background to our team: Heather has a BFA in Dance from ECU. She has a wealth of prior professional experience from the dance and fitness world, as well as experience in IT Sales & Project Management and Real Estate. But her introduction to estate planning was personal:

"After having to do intestate estate administration twice for my father and grandmother and seeing our adopted daughter go through difficult probate issues after her birth mother passed away, I have a thorough understanding of estate planning issues. More than I originally wanted, frankly. I truly value the importance of great planning, and I was impressed by this team's commitment to each other and their work. With my life experience and desire to help others have a better experience, it seemed like a perfect fit!"

Heather and her husband, Eddie, have three daughters: 26, 11, and 9. They live in Cary and in her free time Heather loves to spend as much time as possible with her girls, teach yoga and fitness classes, and travel.

Another big CFEP welcome to Virginia Harrell, a Middlesex, North Carolina native! Virginia's love for hospitality makes her an amazing fit as our new Client Concierge: "I wanted to use my talent for hospitality and wanted to help people. I lost my brother, Jeremiah, who was only 35, in July 2017. Thankfully, he had his planning in place. I am so glad today that he had his 'ducks in a row' for his wife and 5 kids. It made me re-evaluate what was important in life. I love that I can now be a part of making sure that people are at peace with what they leave behind."

Virginia enjoys painting, drawing, photography, traveling (especially to the beach), and spending time with her family. She is engaged to Tim, whom she will marry in November after serendipitously meeting him ten years ago at summer camp. Welcome Virginia!



**Heather Blanchard**  
Estate Planning Manager



**Virginia Harrell**  
Client Concierge

*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.*

### **Edna Ballentine**

- Alex Bartol**, Legacy Wealth Strategies
- Heather Blanchard**, Carolina Family Estate Planning
- Jenny Bradley**, Triangle Smart Divorce
- Trish Cook**, Cook Care Management
- Roger Edwards**
- Tom Gervase**, Coastal Wealth Management
- Marc Gilfillan**, W. Marc Gilfillan CPA
- Jason Jonczak**, Edward Jones
- Mark Kean**, Merrill Lynch
- Joel Ledbetter**, Ledbetter & Titsworth, PA
- William McMenemy**, Donahoo & McMenemy, PA

### **Philip Miller**, Blanchard, Miller, Lewis & Isley, PA

- Tammy Powers**
- Robert Seidel**, Carolina Family Estate Planning
- Hurley Schrader**
- Dan Thomason**, First Citizens Bank
- Linda Ward**, Ward Family Law Group
- Wes White**, American Planning Group, Inc.
- Tina Whitaker**
- Carol Whitmire**, Brown-Wynne Funeral Home
- Mike Williams**
- Sherry Williams**
- Jaclyn Wilson**, Coastal Wealth Management

# Nala's Nook



Nalsworth Dogglethorp, III, Esq. here (but you can call me 'Nala').  
Welcome Spring with me by eating your veggies (better you than me)  
and playing fetch in the park.

- 2 boneless skinless chicken breasts
- 2 tablespoons extra virgin olive oil
- 1 tablespoon fresh thyme, chopped
- 1 tablespoon fresh oregano, chopped
- 1 tablespoon fresh dill, chopped
- 2 teaspoons smoked paprika
- 1 tablespoon lemon juice
- 1 tablespoon lemon zest
- kosher salt & pepper
- 6 cups of Romaine lettuce
- 1 cup cherry tomatoes, halved
- 4 oz gorgonzola, crumbled
- 1 avocado, sliced
- 6 strips crispy bacon, crumbled
- 4 hard boiled eggs, sliced



## Grilled Balsamic Chicken Spring Cobb Salad

*Recipe from halfbakedharvest.com*

### Balsamic Vinaigrette:

- 1/4 cup extra virgin olive oil
- 1/4 cup balsamic vinegar
- 2 tablespoons fresh basil, chopped
- 2 teaspoons dijon mustard
- Kosher salt & pepper
- A pinch of crushed red pepper flakes

1. Add the chicken to a bowl and toss with the olive oil, thyme, oregano, dill, paprika, lemon zest and juice, and a pinch each of salt and pepper.
2. Preheat your grill, grill pan or cast iron skillet to medium high and brush the grates with oil.
3. Grill the chicken for 5-8 minutes per side or until the chicken is cooked through. Remove from the grill and let rest 5-10 minutes. Thinly slice the chicken.
4. In a large salad bowl, combine the greens, tomatoes, and gorgonzola. Top the salad with avocado, chicken, bacon, and eggs. Serve the salad alongside the balsamic vinaigrette.
5. In a glass jar, combine all ingredients and whisk or shake until combined. Taste, and adjust seasonings to your liking. Serve alongside the salad.

### 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, April 3 10 am • Thursday, April 11 6:30 pm  
Wednesday, April 24 6:30 pm • Wednesday, May 8 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.*

# CAROLINA FAMILY ESTATE PLANNING

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Join CFEP in supporting  
Western Wake Women's Club's

## Cheers for a Cause

Annual Fundraiser  
&  
Silent Auction

May 3, 2019  
6-9 pm  
Hyatt Place Raleigh West

Proceeds from the Silent Auction go to Abby's  
Army, a non-profit offering support to families  
affected by pediatric cancer.

Visit  
[www.westernwakewomansclub.org/](http://www.westernwakewomansclub.org/)  
for more info.  
We'd love to see you there!

