

Get Your Ducks in a Row!

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

September 2018

CONGRATULATIONS AND BEST WISHES TO LORRAINE DAVIS!

Lorraine Davis has been with Carolina Family Estate Planning almost since the very beginning. In 2018 terms, perhaps, she was a CFEP "early adopter." How early? She started almost eight years ago as... A professional witness.

In the early days, just after I founded the firm, we were so small we didn't have enough team members on staff to properly witness a will, trust, or anything else. Hence Lorraine.

Lorraine would get a call, zip to our tiny office, sit through the formalities, listen, sign. Somewhere along the line she realized it was really interesting. In short order, she joined our little law firm.

That was seven and a half years ago. In that time, Lorraine has done almost every job we have except attorney—and we're pretty sure she could handle that too, if she'd been so inclined.



Client Services Specialist Lorraine Davis

In all this time, we could never convince Lorraine to go full time. She's always worked part time. And yet she constantly finds ways to do in 25 hours what takes most people 40.

In a few short weeks, Lorraine will be our first team member to retire. She just became a grandmother—you probably saw the pictures on our Facebook page and in our August newsletter—and she's going to help out when her daughter-in-law goes back to work. What can we say... she loves being G-ma! How can we compete with that?

The rest of us have no idea how to feel about Lorraine's retirement, other than we hate to see her go. I will miss her positive attitude, which has always been future-focused, even during difficult times. And, of course, her beautiful handmade cards. No doubt, Lorraine is going to keep busy... but she assures us she'll be available for emergency witnessing when we need it.

Jackie Bedard is an Estate Planning Attorney at Carolina Family Estate Planning. As the founder of CFEP, she continually strives to recruit and foster a talented, happy team of estate planning professionals.



Carolina Family Estate Planning

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Practice Areas:

Wills • Living Trusts • Asset Protection Trusts
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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We're Moving in November!!!

It's been five years since we moved to the Re/Max United Building at 51 Kilmayne Drive. We have welcomed hundreds of nervous, overwhelmed men and women who have taken that very first step through our door on their way to planning for a better life and a secure future. Our office has served us well as we've eased that initial anxiety with helpful information, coaching, and, often, a warm cookie on the side!

But we've been growing! Last year, to accommodate our team—which now numbers 12—we took over office space on the third floor of the building. It helped to have some breathing room, but it hasn't exactly been ideal to be spread across two separate floors. And we've started to outgrow the new space as well.



We are excited to announce that beginning November 5th, Carolina Family Estate Planning will have a new home at **201 Commonwealth Court**. Less than a mile from our current office, the new space is on the opposite side of Kildaire Farm Road, just behind the ERA Building. The move will give us about 40% more office space, a fifth conference room, and a bigger Learning Center for a more comfortable seminar experience. Stay tuned for details about an Office Warming Open House!

Want to be our neighbor? There are still a couple suites for rent on the second floor. Call Michael Vulpis at Avison Young at 919-420-1562 for details.

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.

David & Billie Jo Barbour
Robert & Nancy Cherniak
Bill & Marie Colgan
Paul Delaney, CFA,
Capital Endurance Group
Stephen & Elizabeth Evola

Tom Gervase, Coastal Federal Credit Union
Edith Graham

Jason Jonczak, Edward Jones

John Lancaster, Lancaster & Townsend CPAs

Joel Ledbetter, Ledbetter & Titsworth, P.A.

Jim & Cindy Meckstroth

DaLaine Meyers

Louis Prosser, Eagle Strategies, LLC

Jonathan Richardson,

The Law Office of Jonathan Richardson

Dan Ridley

Katie Seavey, SAS Work/Life Program

Gene & Arlene Sassone

Maura Silverman, Triangle Aphasia Project

Jesse Shapiro, Wilson, Reives & Silverman, PLLC

Ray Stancil, Brookdale Cary

Chris & Karen Vaughn

Bob & Cindy Wilke

Jaclyn Wilson, Coastal Federal Credit Union

Rick White, Patriot Wealth Management



Nala's Nook

Nalsworth Doggleshorp, III, Esq.
here (but you can call me 'Nala'). I'm
bringing a little fall fun to my corner,
so jump right in!

Triangle Fall Festivals

CLAYTON HARVEST FESTIVAL

CLAYTON, NC

WEDNESDAY, SEPT 12-SUNDAY, SEPT 16

OKTOBERFEST AT RALEIGH BREWING

RALEIGH BREWING CO.

FRIDAY, SEPT 14

5TH ANNUAL DRAGON BOAT FESTIVAL

CARY, NC

SATURDAY, SEPT 22

CITY OF OAKS PIRATE FESTIVAL

NC MUSEUM OF HISTORY

SATURDAY, SEPT 22

36TH ANNUAL STORYTELLING FESTIVAL

OAK VIEW COUNTY PARK, RALEIGH, NC

SUNDAY, SEPT 29

46TH ANNUAL FESTIFALL ARTS FESTIVAL

CHAPEL HILL, NC

SUNDAY, OCTOBER 7



MAGGY Voting Has Begun!!



5 Rules for MAGGY Voting:

- 1) Go to <https://vip.carolinafep.com/vote>
- 2) Enter your email and check the box. (We get it...but Cary Mag is a great publication and you can unsubscribe at any time.)
- 3) Click "Next."
- 4) Enter your picks. (Alternatively, skip straight to Page 3, #57 for "Best Attorney.") May we politely suggest you chose Jackie Bedard?
- 5) Click "Next" once more. Then, click "Done." YOU DID IT!!

If you're a fan of CFEP, cast a vote for
★ Jackie Bedard for Best Attorney!

Per Maggy Rules, you must vote for an
individual attorney, not a firm, so
A vote for Jackie is a vote for Carolina
Family Estate Planning and the CFEP Team!

★ VOTE by 5 pm on Sept 28!! ★

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):

Thursday, Sept 27 6:30 pm • Wednesday, October 10 10 am

Thursday, October 18 6:30 pm • Wednesday, October 24 3 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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What's New at Carolina Family Estate Planning?



Client Welcome Specialist Amanda Keiffer and her husband Jeremy welcomed baby Caleb on August 19 at 6:09 am.

Caleb made his entrance at a strapping 7 lbs, 8 oz and 22 inches long! The Keiffer family is doing well, enjoying their new addition and grabbing sleep when they can.

Welcome Caleb!



“I've been working with Jackie Bedard and her staff and their services have been well above expectations. Jackie successfully helped me with forming an irrevocable Trust for my mom, Emily, who is the widow of a WWII Veteran. Mom has successfully qualified for aid and attendance through the efforts and support of Jackie.

TIM M.
CARY, NC

