

Ducks In A Row Digest



CAROLINA FAMILY ESTATE PLANNING • MONTHLY NEWSLETTER

HOLIDAY SPECIAL 2023 • ISSUE #11

What's Inside

'Tis the Season to Talk Estate Planning

Unlock 5 tips for a smooth Estate Planning conversation during this holiday season.

A Message From Jackie

Here is a message of appreciation for an incredible and memorable year.

Assets and Laughs

Get a glimpse behind the scenes at our office. What's been going on lately?

Ho Ho Ho! It's Puzzle Time!

Unwrap a treat for your brain with the crossword game in this special edition!



Big News!

Carolina Family Estate Planning named 2023 Law Firm 500 Honoree!

This prestigious recognition celebrates us as one of the FASTEST GROWING LAW FIRMS IN THE US.

This achievement is a testament to the dedication of our incredible team and, most importantly, the trust you, our valued clients, bestowed upon us. We extend our heartfelt gratitude to everyone who has participated in this journey. Your support fuels our commitment to providing exceptional estate planning services.



Thank you



'Tis the Season to Talk Estate Planning

It's hard to believe how quickly this year has flown by, and as we find ourselves in the midst of the holiday season hustle and bustle, we feel a special kind of excitement. As families gather, laughter becomes the soundtrack in our homes, and traditions tug at nostalgia strings in our hearts.

Now, I get it. The holidays are a time for joy, not discussions about legal matters. But trust me. This season offers the perfect opportunity to converse meaningfully with your whole family. Just as we pass around stories and share memories, talking about estate planning is a way of showing our love and care for the ones we cherish most.

Starting the Conversation

I recognize that approaching this subject can be sensitive, but it doesn't have to be awkward. Here are our five tips to help you start the conversation smoothly:

- 1 Plan Ahead**
Choose a time and place for the conversation, preferably before the festivities begin (remember alcohol can stir up emotions and make the conversations difficult). Then, gather with your loved ones and tell them why this topic matters to you.
- 2 Get Ready to Communicate Your Plan Effectively**
Be clear on your wishes and what you've included in your plan, especially if responsibilities will fall to your loved ones. At our office, we provide a summary of your plan that explains everything in layman's words. Review your summary before your talk; it may help to write down additional notes.
- 3 Get Comfortable**
A tough discussion can be easier if everyone is relaxed. Pick a place where you can talk freely and your family can pay attention. Maybe by the fireplace, with some hot chocolate and cookies. 🍪



- 4 Start with why**
You have a good reason for every decision in your plan. Explain why you chose what you did, and be ready to answer questions and listen to what they think. Keep the conversation open and honest. Avoid getting defensive or judgmental.
- 5 Remember**
Your legacy is more than just money and property; remember to talk about your nontangible assets, such as your values and cherished family traditions. This thoughtful approach adds a personal touch to your estate planning, truly reflecting your unique legacy.

But what if I don't have a plan yet?

If you do not have an estate plan yet or you are unsure that the plan you have will accomplish your goals, **please contact us at (919) 694-4437 to schedule a Case Assessment.** During the meeting, we will discuss your goals and values and advise you about your options to make your plan work for you. Or join one of our free estate planning seminars for valuable insights.

I hope these tips help you approach this important topic with your loved ones and you have a joyful and peaceful holiday season.



A MESSAGE FROM JACKIE

I find myself in shock that I'm writing this...but *as we wrap up another remarkable year*, I wanted to take a moment to express my gratitude for your continued partnership. This year has been an incredible journey, and none of it would have been possible without you.

Our success is a testament to the dedication of our exceptional team. Each member has played a vital role in achieving milestones and receiving recognition locally and nationally. Together, we've impacted the lives of hundreds of families, and that's a source of immense pride for us.

I want to take a moment to thank you for your trust and loyalty. Your support has been instrumental in our achievements, and we are truly grateful for the opportunity to serve you. As the holiday season approaches, I wish you and your loved ones joy, peace, and fulfillment.

Looking ahead to 2024, I am excited about the possibilities that lie ahead. With your continued support and the dedication of our exceptional team, I am confident that the coming year will bring even greater success. We are committed to maintaining the high standards that have earned us your business.

Thank you for being an integral part of our journey in 2023. Wishing you a wonderful holiday season and looking forward to an amazing 2024 together.



Assets and Laughs: Estate Planning With a Twist



THANKGIVING



We had a fantastic Thanksgiving at the office! Lunch, games, and lots of gratitude. It reminded us what an incredible team we are!



WORDS FROM OUR CLIENTS:



Kay W. / Raleigh, NC

★★★★★ September 2023

“Best experience ever in helping me go through a difficult task! I was treated with kindness, respect, professionalism, and genuine care and concern for my questions and requests. From the initial contact to every correspondence and meeting; what a 5-star team!!!!”



Review us on Google! Scan the QR code and tell us about your experience.

CROSSWORD GAME!

For this special edition, we've got a treat for you – a beloved American puzzle, the crossword game! Grab your pen and join the fun as you uncover 9 hidden words. It's not just entertaining; it's a great way to give your brain a workout. Happy puzzling!

ACROSS

2. Make a ringing sound during the holidays.
3. Something you give or receive on special occasions.
5. Received assets.
6. Treasured family item.
8. Sweet treats often left for Santa.

DOWN

1. Asset receiver.
4. No Will situation.
7. Legal wish list.
9. Shiny ornament often placed atop a Christmas tree.

*Stay tuned for the answers!
Follow us on social media to find out.*



In Case You Missed It:

Our Free Estate Planning Seminars Will Continue to Be Offered Through 2024!

Scan here for more information and dates available!





Thank you for your referrals!



We donate a portion of our income from each Estate Plan, Estate Administration, and Long-Term Care Plan to *Meals on Wheels* of Wake County and the *Dementia Society of America*. When you refer to Carolina Family Estate Planning, 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!

James Woods
Whitley Law Firm, Bob Whitley
First Command - Nick Putnam
Jaime Rudd
Robert Wood
Law Office of Martha McKee
Aging Care Matters, Carla Payne
Kelly Hurd
Capital Financial
Dori Dixon
Christine & Todd Fornes
Daniel & Ann Carlson



Can't Attend Our In-Person Events? Join Our Free **Online** Seminar Instead!

3 Secrets to Protect Your Family Without Going Broke or Being a Burden

· Scan the QR Code and Register Now! ·