Get Your Ducks in a Row!

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

June/July 2019

Leading from Second

I have been thinking a lot lately about a phenomenon I call "leading from second."

Before I joined the firm, Jackie, as founder and sole attorney at Carolina Family Estate Planning, was responsible for the firm's legal work, its marketing, HR, payroll, bookkeeping, IT, policies and procedures, and finding and maintaining office space.

At the time, I was leading a group of software engineers at an open source software consortium. My group was at a critical juncture, deciding about next steps, so I was also reconsidering my life and career direction. I had a decision to make: where should I invest my time and energy?

I chose the law firm. More specifically, I chose Jackie.

In the year after I joined the firm, our firm went on to double in size. We've hired additional legal staff since then. We've outsourced bookkeeping and IT. And we have found that of all the functions Jackie performs as owner of the firm, there is only one that no one else can do: establish the Vision for our firm.

Jackie is passionate about developing planning that takes the whole picture into account. She is constantly investigating and implementing new ways to improve clients' quality of life in their later years--whether that's through health-care directives and personal care or providing detailed instructions to make sure their material legacy is carried forward. All of the other functions of the firm are in support of this vision.

My role is to help clear the way for Jackie's vision to continue to grow. In our situation, that has also meant that I have a place to use my talents and skills. We are partnering in the mission of Carolina Family Estate Planning.

In a way, it's similar to the relationship we have with clients. When we meet during that first meeting--the Vision Meeting--we're trying to figure out what resonates with you. What's important to you. What is your vision for the future?

And once we, together, have determined what that is, our role is to help clear the way for it. The Vision Method that Jackie has developed is designed to "lead from second."

You, the client, are number one. You and your vision come first. But we are here to help lead you into the best possible planning process to actualize your vision. From beginning to end, we take great pains to provide assistance, without losing sight of or imposing arbitrary restrictions on your vision.

We all have presuppositions about what leadership should look like, about who really gets things done. In reality, however, it takes partnership. And partnership is really just different types of leaders, from different vantage points, offering gifts and skills to a shared vision. Behind every leader is a team of supporters. Many of those supporters themselves have the skills and abilities to lead. They choose instead to facilitate the mission of the visionary.

Cheers to our clients' visions for the future, and for honoring us with the permission to help carry it.

If your planning needs updating--or if you've never completed it before--please give us a call at 919-694-4437. We think you will appreciate our unique approach to carrying out your vision for the future. We look forward to partnering with you!

Dan Bedard is the Executive Director at Carolina Family Estate Planning. Dan loves testing and implementing best practices and traveling with his wife, partner and fellow leader, Jackie.

Carolina Family Estate Planning

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Practice Areas:

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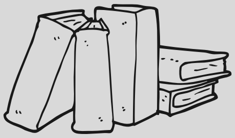
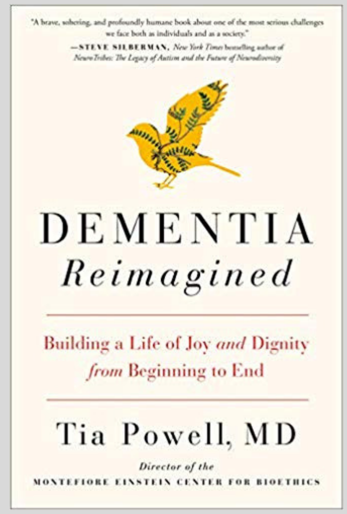


Need a Summer Read?



Despite being a physician and a bioethicist, Tia Powell was less than prepared when her grandmother and then her mother were diagnosed with dementia--not to mention confronting the hard truth that "her own odds aren't great." Dr. Powell does the difficult work of moving the reader from talk of cure and epidemic to questions of care, even finding meaning and joy in humanizing the experience of dementia for all affected parties-patient, family members, clinicians, care-givers. This is a heart-warming and helpful dive into the difficult arena of dementia from an insider in care and research. Trust us, you'll enjoy it!

Excerpted from Dementia Reimagined:

At one point in my life, I thought I knew something about dementia because I could recognize its symptoms and identify a hippocampus. But even as a doctor, I was not prepared when my mother developed the disease. I did not understand the options. I had to learn along with my siblings what sort of care she might need at any given stage and try to get that for her. I don't think we made terrible mistakes, but we made some. Our choices were difficult and the consequences were impossible to know in advance.

Dementia experts note a number of factors that make dementia care, especially at the end of life, both poor in quality and costly without benefit. When I think back over my mother's treatment, I see markers of less than ideal care: barriers to pain control, unhelpful transitions from hospital to nursing home to emergency room. Her journey through dementia was typical in many ways. It illustrates just how far we are from a system that respects those with dementia and their families. All across the country, families are facing similar choices, and they are struggling to find the right thing to do.

Check out Dr. Powell's recent interview with Terry Gross of NPR's "Fresh Air"

https://n.pr/2LZseMu.

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.

Michael & Toni Ann Apadula
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Jennifer Brown, Carillon Assisted Living of Durham
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Kyle & Erin Holmquist
Barbara Masie Chartier
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Will Pagan
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Laird Schweizer and Ann Dowling
Joyce Sharpe
Patrick Simpkins, Proximity Financial Partners
Dan Thomason, First Citizens Bank
Chris & Karen Vaughn
Linda Ward, Ward Family Law
Patti Wilcox

Nala's Nook

Nalsworth Dogglethorp, III, Esq. here (but you can call me 'Nala'). I'll be chasing squirrels and running through the sprinkler while you use your noodle to decode this flag mumbo jumbo. Happy Summer!

Can You Crack the Code?

Modern semaphore flags is a system used for communication that involves a signalman positioning their arms in a fixed position to encode and transmit a message. Used in boating and by lifeguards, we thought it'd be the perfect way to usher in the summer.

Why did the Duck say "Bang"?

A: She was a_____________.

_____ _____ _____ _____

_____ _____ _____ _____ _____ _____ _____

Hint: Check out the Key at vip.carolinafep.com/flags to decode the flags and reveal the punchline.

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inside this issue:

Looking for a Professional Referral?

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We can help! Ask us about our Concierge Network of professionals, including attorneys from other practice areas, financial advisors, and senior care 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.

“Carolina Family Estate Planning was very easy to work with. They have the family estate planning process down pat. Each step is broken down with well organized paperwork to fill out that makes the whole process flow smoothly. They also do not try to up-sell you at all. They are good with whatever plan you choose. We would highly recommend Carolina Family Estate Planning.”

YVES & ROBIN
APEX, NC

“I have confidence in Carolina Family Estate Planning, that when "the time comes," all will go smoothly for our heirs.”

TOM
PITTSBORO, NC