

Get Your Ducks In a Row!

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

July 2018

Welcome to CFEP's New Attorney, Robert Seidel!

Robert Seidel joins Carolina Family Estate Planning after years of exemplary work as a General Counsel for dozens of business of all sizes. He's handled almost every conceivable aspect of business law including litigating complex and diverse issues, but what caught our eye – it was impossible to miss, actually – was his extensive work designing and implementing estate plans for a mindboggling cross section of clients.

But, that's not why we asked him to join our firm.

This is why:

Robert's mother tells everyone Robert was six when he told her he was going to law school. Robert replies, "That's absurd . . . I was at least eight."

After you talk to Robert about the law for more than ten minutes or so, you'll side with his mother.

Robert grew up in a small town, Marshfield, almost dead center of Wisconsin. It's farm country but boasts a renowned cardiac center downtown. It's a town of farmers, doctors, hospital administrators, and workers. That's an important piece of Robert's story. From a very young age he

grew up with the overpowering sense that "things just didn't fit right. A few people wielded all the power; they bullied the rest."

The way to fight that, Robert was convinced, was 'to know stuff.' To know more than the bullies, use it to stand up to them, use it to 'look out for people.'



So, law school was the way to go. Becoming a trust and estates attorney was cemented while he was attending St. Norbert's College. His grandfather passed away, the family was not close, and the lawyer handling the estate had a will reading immediately after the funeral.

Robert's most charitable description of the lawyer is 'bumbling.' His reading of the will, interrupted by heated arguments that anyone would have seen coming, was 'horrible.' He explained nothing, had no answers to any questions, ceded control of the room seconds after he started, and ended by suggesting that all incensed family members get together to pay off a \$10,000 estate debt before moving forward.

By the time he entered the Hamline School of Law in St. Paul, Minnesota, he knew exactly what he wanted to do for the rest of his professional career.

Robert lives in Durham with his wife Ann where they spend their free time with their two adult children, Laura and Jeff. When he's not practicing law and playing bridge, Robert, self-taught, plays the guitar. Ann and Robert camp and white-water raft, but make sure to take a deck of cards along. *Welcome to the CFEP Team, Robert!*

Jackie Bedard, Author and Founding Estate & Long-Term Care Planning Attorney

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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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Exploring the Thin Places: Travels in Ireland

“For now, just know that everyone is meeting up at the Dublin Airport on Saturday, June 23rd at noon.”
“This is no mere vacation. It’s a pilgrimage.”

I’ve just returned from a weeklong trip to Ireland. As it turns out, the above was almost everything I would know about the itinerary before arriving. What was I getting myself into?

At the end of June, I had the great fortune to join best-selling author Perry Marshall and 10 other business owners to explore “thin places” in Ireland. Before I arrived, I had only a faint expectation of what might be coming. I have returned with a new energy and conviction about what I want to do—including what I know Carolina Family Estate Planning can be.

So... what happened in Ireland?



A lot. Too much to put in a single newsletter article. So, for now, I’ll share a few highlights. Upon arrival, we rented 3 cars and roughly followed the coast of Ireland, driving counterclockwise. Along the way, we visited “thin places,” and I met some incredibly interesting people. I climbed a few mountains and enjoyed the beauty in silence. I set foot on an island that few people have ever visited. And I witnessed a few things I can’t really explain.

The understanding that I came back with is that we have an opportunity to do more at Carolina Family Estate Planning than I had realized. For a long time, Jackie and I and the team have been striving to differentiate ourselves from other law firms. You see it in our approach to client care: the cookies, the educational seminars, this newsletter, the dozen or so books on our website, the pains that we take to make sure that we get the details right—and to fix them right away when we occasionally fall short.

All those details are important, and we’ll continue to do them of course, because they’re helpful, and they are completely congruent with who we are. But now I realize that there are things we can do that are much harder to articulate or train new team members to embody. We have, I realized, been hiring for this ability without even knowing it. Now we need to cultivate it every day. What are we trying to do?

To initiate transformative improvement in our clients’ lives through estate planning services.

I know that sounds lofty. But we do some of it already: think about how you feel before and then after you “get your ducks in a row” by planning ahead or by settling a loved one’s affairs. Many clients arrive paralyzed by the very idea of making the wrong move. And once we’ve helped them make it all neat and tidy? Freedom.

But now we have started working with our team to cultivate an ability they innately possess (because we hired really really well), but which we never encouraged before: Go deeper. Talk less; listen more. Empathize. Where before we might have held back some words of encouragement because it seemed unlike something a lawyer would say, we are going to honor you with those words.

In short, I’m not sure where this will go yet. But I know it’s the right path. And, well, I want to thank you for being a part of it. Want to know more about Ireland? Curious what “thin places” are? Follow me at vip.carolinafep.com/Ireland2018

Dan Bedard, Author & Executive Director of CFEP. Lover of dogs, traveling and efficient systems.

Nala's Nook

This Month in
History:
JULY

2 On this day in 1964, President Lyndon B. Johnson signed the Civil Rights Act of 1964.

4 In 1776, the Declaration of Independence was approved by the Continental Congress. Happy Birthday to the United States of America!

12 American writer and philosopher Henry David Thoreau was born in Concord, Massachusetts in 1817.

19 In 1848, a women's rights convention convened in Seneca Falls, NY, marking the beginning of an organized women's movement in the United States.

24 American pilot Amelia Earhart was born in 1898 in Atchison, Kansas. She became the first woman to fly solo across the Atlantic!

27 The Korean War ended on this day in 1953.



Nalworth Dogglethorp, III, Esq. here (a.k.a, Nala). I'm still bringing something fun or interesting each issue!



Jackie and her team were a joy to work with! She made a difficult subject easy to understand. My husband and I are now confident that our needs and our children's futures are fully prepared for. What better peace of mind for us and gift to our children! Thank you Jackie!"

-Wendy, Cary NC

Planning for the 2nd 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 similar.

Upcoming Free Seminars: *RSVP required*

Thursday, July 26: 6:30 pm • Thursday, August 9: 6:30 pm

Wednesday, August 15: 10 am • Thursday, August 23: 6:30 pm

Register by phone: **919-694-4437** or online: **seminars.carolinafep.com**

Can't attend? Call us! Additional dates may be offered based upon demand. We'll keep you updated of future offerings or other resources to assist you.

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Thank-Yous

THANK YOU

Thank You For Introducing Your Friends & Family to Our Office!

We're devoted to delivering first-class service to our clients. As a result, our valued clients, partners, and friends refer their family, friends, and associates to us.

Dave Anderson, ReMax/United

Christopher & Andrea Blake

Tom Gervase, Coastal Federal Credit Union

Dave Minton, Like a Daughter

Billy Mott

Marty & Le Ringgold

Ashley Crane, First Command Financial Services

Tim & Roxanne Rhoads

Dan Ridley

Maura Silverman, Triangle Aphasia Project

Ray Stancil, Brookdale Cary

Jack & Eunie Walder

Jaclyn Wilson, Coastal Federal Credit Union

Tate Young, First Command Financial Services



Check out our BIG CFED News Inside!

