

# Quarterly PLAN-IT

Winter 2024 Client Newsletter



## Meet Sara, Our New Team Member!

Sara VanLeuven is our Intake and Experience Specialist with a professional background in finance, insurance, and legal services. She has worked closely with clients for over 20 years, building lasting relationships and assessing their needs to ensure satisfaction. Her most recent role was at a Baltimore Court Reporting Firm, where she handled depositions and litigation preparation for asbestos cases and networked with attorneys across Maryland. Sara aims to create an enjoyable experience for each client and establish long-lasting relationships with clients, helpers, and partners. [Please join us in welcoming Sara!](#)

## Featured Blog

*The Unique Challenges in Estate Planning for Blended Families*

Within the dynamic landscape of contemporary family structures, the unmistakable ascendancy of blended households is evident. While the tapestry of these familial unions is intricately woven with sentiments of love and dedication, the intricacies of estate planning for blended families present a distinctive array of challenges that necessitate meticulous scrutiny.

[CLICK HERE](#) to read the blog.

## Funding Update

*Demutualized Insurance Company Common Stocks*

If you own stock in an insurance company that has undergone demutualization, you can transfer the stock into a brokerage account for easier ownership transfer in the future. This allows for the brokerage company to provide the Signature Medallion Guarantee required for transferring ownership, rather than having to go to a bank which may have limitations and requirements.

[CLICK HERE](#) to contact us for questions

## Important Dates:

**February 17th:** Annual Client Family Reunion for Married Clients

**February 24th:** Annual Client Family Reunion for Unmarried Clients

