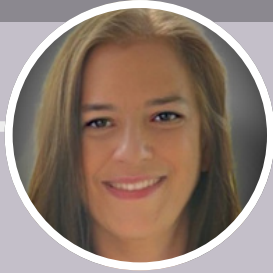


Quarterly PLAN-IT

Winter 2025 Client Newsletter



Goodbye & Well Wishes Donna!

Donna's last day with the firm was February 28, 2025. She has moved onto another position outside of the law firm.

We wish her well in the next chapter of her career where she will be able to leverage her education and professional experiences across several industries: Financial services, Computer Support, Food Vending, and of course Estate Planning legal services!

FAQs & Fast Facts

Useful Resources

Have you seen the FAQs & Fast Facts videos under the Resources section of our website?

In FAQs, you will see general estate planning questions and answers plus useful information for when a loved one passes way, both what to do and what not to do!

Fact Facts are quick videos. Watch the School Bus video and you will be able to answer the question the next time Ed asks for someone to explain the School Bus story!

[CLICK HERE](#) to visit the website.

[CLICK HERE](#) to contact us.



Funding Update

Initial Funding, Before the AFR, & Everyday!

Properly titling your assets and sending verification to the firm is not just a one and done event.

Anytime you want to open an account, purchase a vehicle or other property, let us know beforehand so we can advise you how to title the asset and/or list beneficiaries to ensure your wishes outlined in your estate plan will be realized as you intended.

Your asset is verified when the firm receives a statement or official document with the proper owners or beneficiaries.

Important Dates:

Annual Client Family Reunion™ (AFR™) Meetings

- March 1st Unmarried Clients
- March 15th Married Clients
- March 22nd Proactive Elder Law Clients

Can't make the date for your group? Watch the video and do your homework!

www.estateplan.org

