ISSUE #4

Monthly Newsletter

LEGAL JOURNEYS, LLC

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April 2025

Welcome to April!

Happy April! We are so excited to share updates in this issue with you.

We are sad to say that our moving date for the new building did get pushed, but you will be the first to know when we move! We are so excited to share this with you!

Legal Journeys is looking for **Google Reviews** from our favorite clients. You'll find more information in our **Client To-Do** Section, but if you **love LJ** and want a chance to **win a prize,** check that section out to see how you can win!

We've been seeing so many ads and receiving so many calls about DIY trusts and wills. They're cheap, seemingly easy, and "done by lawyers." What could possibly go wrong? Well, Levi & Rebecca cover this in their education section of the newsletter. **Don't put your family at risk** with a cheap DIY plan!

We have so many things coming up in the Spring! We have **added a South Huntsville satellite office**, event, and one to two days a week in our S. HSV office with Rebecca.

We have some **scheduling changes coming up in April** as well, so be sure to pay close attention to that in our **LJ Updates** section.

Thank you so much for continuing to support our business. **We love our clients,** and we love when you refer your friends and family to us. It is the highest honor, and we want to make sure we take care of them. Thank you for your trust in us!

Legal Journeys Team - XO

In this newsletter you can expect:

- The Pitfalls of DIY Trusts & Wills
- Legal Journeys News and Highlights
- Funding Spotlight
- Special Days- Birthdays, Anniversaries, etc.
- Upcoming Events
- Joke of the Month + TLDR

We're Calling "April Fools!" on DIY Estate Planning

The worst April Fools joke is that of a DIY Estate Plan. You don't have to dig far into the world of the internet, or Social Media for that matter, to find a DIY service promising a Will or Trust (created by a lawyer, they claim) at a low cost... "Starting at $199!" Ask on any Social Media platform for an attorney who does Estate Planning in your area, and no doubt you will have some well-meaning person advising you to "look at such-and-such website, you can get your estate plan done for so cheap! You don't even have to go see a lawyer!"

You most certainly CAN do this, and many people do; however, I assure you that most of these people's families will end up right back in an attorney's office with that DIY plan, paying WAY more, because, well... **most times these plans just don't work.** And they can have some serious unintended consequences. **Let's look at why we're calling "April Fools!" on DIY Estate Planning.**

Legal Documents have Legal Consequences. Even if you think you understand the words, there are lots of nuances in legal terminology. There's a reason why attorneys have to go to school for years and then take the very difficult Bar Exam to become a practicing attorney. It takes time and effort to learn the law, terminology, and the application of the law. Even then, you want to get an attorney who knows the ins and outs of Estate Planning, as we do.

A Real Life Cautionary Tale: A woman (we'll call her "Jane") passed away. Her husband came into his lawyer's office to get legal advice on how to proceed. Jane had received an inheritance from her first husband and was close to her adult children and grandchildren. She wanted the children and grandchildren to inherit the money from their father, Jane's first husband, who had passed away. She had made that very clear to her family before she passed.

However, Jane had been frugal. She didn't want to spend money on an attorney, so she did some research on Google about Wills and Trusts, downloaded some forms, and wrote her own documents. She wrote a Trust to keep her family from going to Probate....

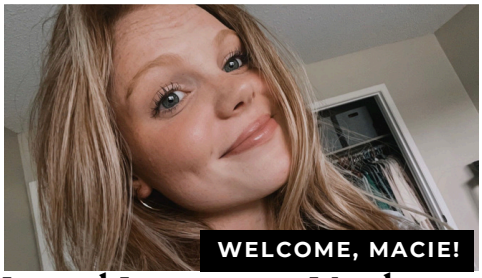
When her new husband's lawyer read Jane's DIY Trust, Jane had ACTUALLY left her ENTIRE INHERITANCE to her second husband, and legally disinherited her children and grandchildren. It was also subject to laws in a different US State than she lived in, so it was more complicated than it needed to be. She also failed to transfer her house into the Trust and left assets out of her trust altogether, leaving her family with a giant, expensive mess.

Don't be like Jane. Come see us and let our attorneys and professional team draft your papers so that your family is protected and your plan actually works when your family needs it most. For more info, call or click.

- Levi and Rebecca

Call or Click for your appointment today!

www.legaljourneys.com	256-850-3431



Legal Journeys Updates

Our **new building** is *so close*. We unfortunately were unable to move in at the end of March, but we are tentatively planning a **move-in for mid-April.** We will keep you updated as we know more, and will send out an email letting you know when we have officially moved.

We have some schedule changes happening with the beginning of this month. We are now taking Mondays as administrative days. We will be using these days to have our in-house meetings, staff meetings, drafting documents, planning, etc. We will typically not be seeing clients on Mondays as we will be focusing on in-house management. We are doing this to better serve our clients so we can make sure that we are serving you with excellence.

Welcome to the newest member of our staff, **Macie Beavers.** She joins us beginning April 4, and we couldn't be more excited! She will become the new voice when you call and the new face when you enter our office. You might also find her on the weekend leading worship at Church of the Highlands! Join us in giving her a warm welcome!

Do you have friends in South Huntsville who need our services but don't want to drive to Madison? Great news! **We now have a satellite office in South Huntsville.** Office Park South, 600 Boulevard South, Huntsville, AL 35802. **Check out our events coming up below** and **register** for our **South Huntsville Location!**

Special Dates

1 - April Fools Day

11 - National Marketing Appreciation Day

17 - Wills & Trusts 101 Event Myths & Mistakes @ Spenryn

18 - Good Friday - Office Closed

20 - Easter - Resurrection Sunday

22 - Wills & Trusts 101 Event Myths & Mistakes @Building 600 in South Huntsville

22 - Earth Day

23 - Administrative Professionals' Day

Upcoming Events

- **Wills & Trusts 101 In-Person Events**
  Free Estate Planning Events. Free dinner and estate planning info. For more info or to register, go to www.legaljourneys.com/events
- **Lunch + Learn**
  Legal Journeys wants to bring **YOUR OFFICE** lunch and tell you about why we are so passionate about what we do, and why it's so important that you have an estate plan!
  Email info@legaljourneys.com for more info!

Funding Spotlight, To-Do, & More...

Life Insurance & Businesses

Life Insurance: List the trust as the primary beneficiary. For life insurance policies for your children, you should make the trust the owner, but NOT the beneficiary.

Businesses should be assigned to the trust. Call to set up a consultation if you have a business you haven't yet put in your trust.

Did you love our services? Do you have peace of mind now that you've gotten your planning done? Do you want to help us grow our business and tell others about us? Then **leave us a 5-star Google review.** We will be **giving away monthly prizes** starting this month to people who have left a Google review for that month. So, don't delay! Press or scan the QR code below to leave a review and have a chance to win this month's prize!

Certificate of Trust

Remember that this is the 3-5 page document that the banks or institutions get when transferring all your assets into the name of the trust. You may have a bank or institution ask for a copy of the trust or the whole trust, but they don't get that. The **Certification of Trust** has all the information they need without all the personal information they don't need.

Joke of the Month

Dogs can not work an MRI machine.

But cats can.

I got fired from my job at the bank.

The lady asked me to check her balance, so I pushed her.

Have a great joke you'd like to share? Submit it to brandy@legaljourneys.com and you might see it here!

Staff Spotlight

April's Staff Spotlight is Brandy Miller. She is originally from Knoxville, TN and moved to the Huntsville area in 2020. After teaching for 13 years, she left the classroom to get the word out about the importance of Estate Planning. When she isn't at work, she loves spending time with her son, Elijah, her pit bull puppy Sadie Grace, her friends, and her boyfriend. She enjoys attending and singing at Church of the Highlands, being outside, a good fire pit with s'mores, and a sky full of stars.

TLDR

- We now offer a **satellite location** in **South Huntsville!**
- Welcome to **Macie Beavers,** our newest staff member!
- **Estate Planning DIY** is the **worst April Fools.**
- If you've used and loved our services, help our business and those looking for an attorney by **giving us a 5-star Google review**. You can also **win one of our monthly prizes** by doing so.
- If you or someone you know still **needs an Estate Plan**, **come to** one of our April events. Register here: www.legaljourneys.com/events