ISSUE #8

Monthly Newsletter

LEGAL JOURNEYS, LLC
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Wrapping Up Summer

As we wrap up summer and kids are heading back to school, if you (or someone you love) has a Kids Protection Plan, this is a good time to check the date. Those need to be signed each year, even if it's with the same people. **Reply to this email** if your KPP is out of date.

Going into the fall, I'd love to know a little more about our audience. The author of this is a Vols fan, and I imagine **if you're an Alabama or Auburn fan,** you're cringing right about now. Who's on the other side of this newsletter? Would you take the 3 question google form quiz to let me know who you're rooting for this fall? Here is the link, or it's on the top of this email:

https://forms.gle/QmystoEtsX6h8EQh7

The article this month, "How to Bring Up Wills (Without Getting Written Out of One)," was an idea suggested by one of our clients. She wrote to us a few months ago asking us to give suggestions talking about how to talk to aging parents about Estate Planning. Do you have a topic you'd like to see in a future newsletter? Let us know! **We'd love to hear from you! Really! Just reply to this email and let us know:**

- What do you want to know more about?
- Do you have unanswered questions?
- Do you have a funny story you'd like to share?
- Do you have a joke you'd like to add to the newsletter?
- Other ideas that you've thought of and we haven't?

Be safe in school zones, stay cool in the heat, and don't forget to let us know who you will be rooting for this fall!

Legal Journeys Team - XO

In this newsletter you can expect:

How to Bring Up Wills (Without Getting Written Out of One)

What Would YOU Do With a Surprise $500k? Here's What WE'D Do.

Birthdays, Anniversaries, etc.

Business Owners...Do You Have This Important Legal Document?

Joke of the Month + TLDR

How to Bring Up Wills (Without Getting Written Out of One)

We get it. Talking to your parents about estate planning can feel like walking a tightrope over a pit of emotional landmines. You don't want to sound greedy, morbid, or like you're eyeing the family china a little too eagerly. So how do you start the conversation without getting yourself removed from the will?

Here are a few smart—and mostly safe—ways to open the door:

1. Start with your own plan.

"Hey, I finally got my will and powers of attorney done. It made me realize how important it is. Have you and Dad updated yours lately?"

Framing the conversation around your own planning helps take the pressure off and makes the topic feel more natural.

2. Blame it on us (we don't mind).

"Did you know Legal Journeys is hosting a free event about estate planning? They make it surprisingly fun—and you'll leave with more answers than questions."

We love helping families have these conversations in a relaxed, welcoming setting. Bring your parents. We'll do the heavy lifting. Our events this month are **Tuesday, August 19th in Madison** and **Thursday, August 21st in Huntsville.** You can register at www.legaljourneys.com/events.

3. Use humor… wisely.

We don't officially recommend saying "Do you even love me?" or leading them in a "two-minute death meditation," but hey, if your family thrives on dark humor—use it to your advantage. Just maybe follow up with a sincere, "I want to make sure your wishes are honored."

What's your next step? Make an appointment with us to talk and plan for your family's future and legal plan ***before*** you go on vacation.

Want more info? Check out our website below or give us a call to set up a complimentary 15-minute consultation. Or if you'd rather, **reply to this email** to get started today!

4. Emphasize peace of mind.
The truth is, estate planning isn't about money. It's about making sure your parents' voices are heard, their wishes are clear, and you're not left scrambling in a crisis.

Still unsure how to start the conversation? Let us help. Invite your parents to one of our upcoming events (they might even enjoy it—we've been told we're surprisingly entertaining for attorneys).

👉 Call us at 256-850-3431 or
visit legaljourneys.com to learn more.

-Levi, Amanda, + Kay

Call or Click for your appointment today!

www.legaljourneys.com	256-850-3431

Let's Get Personal: What Would YOU Do With a Surprise Inheritance?

Research shows that **inheritance is usually spent within 18 months.** When Levi started, that number was 24 months....and *rumor has it,* **it's down to 12,** but since no *official* research has been published, we'll keep it at 18. So inquiring minds want to know, ***what would you do with a surprise inheritance of $500,000?*** Our Marketing and Relations Director, Brandy, asked our team just that, and here was their answers:

Levi: I'd invest it. Some for retirement, and some for investing in the business.

Elaine: Take a trip to Italy with Levi, pay off debts, and invest the rest.

Karen: I would help my mom, then save the rest.

Brandy: I'd pay off debts, buy a new car, and go on a really fantastic vacation. Then, I'd save and invest the rest, using a really great Financial Advisor. We have a few that we know, like and trust, and I would use one (or all!) of them!

Max: Treats. Wots and wots and wots of treats! And a frisbee. And a ball. And treats. And another ball. And another frisbee. And maybe some more treats. And treats for my brother and sister too.

Kyle: I'd pay off my debts, save for retirement, and invest.

Macie: Pay off debt, finish school through doctorate, buy a house, go on a mission trip, and create a music room in my house with instruments and records and a record player.

Amanda: I would pay off my debts, save for retirement, take a great vacation, and buy a rental property.

Kay: Take my entire family on a week-long trip to wherever they wanted to go, gift some to my family, pay off debts, and invest the rest.

Elijah: Invest, finish school, pay off debt, acquire some sort of living space, then save the rest.

There you have it! Most of us are on the responsible end of the spectrum, but I'm curious.... ***What would YOU do*** with a surprise $500,000? Let us know by hitting "reply" to this email!

Special Dates

9 - Rocket City Octane Auto Show

19 - Wills & Trusts 101 Event - MAD Myths & Mistakes @Offices at Spenryn 5:30 p.m.

26 - Happy Birthday, Levi! 🎉

31 - Wills & Trusts 101 Event - HSV Peace & Protection @Bullet & Barrel 5:30 p.m.

Upcoming Events

- **Rocket City Octane Auto Show**
  We will be a sponsor at this year's show! Drop by and see us!
- **Wills & Trusts 101 In-Person Events**
  Send friends and family to learn about why having an estate plan is so important. 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! Interested? Fill out our interest form at: https://legaljourneys.com/lunch-and-learn/

Funding Your Trust

You've heard us talk about "Funding Your Trust" like it's a past-time....like it's a bank account you open and you actually put money into. But **HOW EXACTLY** do you "*fund your trust?*" And when you fund your trust, can you still access those funds?

Yes. You can access the funds. As long as you are alive and have capacity, you will manage your funds exactly the same, just as the trustee of your trust. And as far as funding your trust, it really depends on the type of account and trust.

At your signing, we give you a **one-page funding checklist** to help you **easily navigate funding your trust**. If for some reason you don't have that or can't find it, **reply to this email and let us know.** We will be happy to send a copy to you.

Please make sure you have **fully funded your trust,** as **anything that is still owned in your personal name at the time of your passing will still have to go through probate.** That would make your trust one expensive paperweight! Don't hesitate to reach out with questions. We are here to assist!

Client To-Dos

Are you a **small business owner** who has done planning with us? If so, make sure you have the **assignment of business interest** document. If not, please **reach out to us** for your **FREE template *from us*** (i.e. please don't use ChatGPT or other AI or DIY source) so your business is properly funded in your trust. *Not sure how to do this?* **No worries.** You get **unlimited guidance** from us. We will be happy to help you!

Joke of the Month

What did the janitor say when he jumped out of the closet?

"*SUPPLIES!!*"

What is it called when one banana eats another banana?

Canabananalism.

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

Staff Spotlight

This month, we would love for you to meet Amanda Messer. She is one of our attorneys at Legal Journeys. When she isn't working with our clients, she is the proud mom to a 12-year-old son and 20-year-old daughter. She and her husband love to watch movies, enjoy the outdoors, and hang out with their kids and their cat (who looks strangely like Toothless the Dragon from the movie "How to Train Your Dragon.") If you haven't met her yet, we know you'll love her.

TLDR

- **Respond to this email** with anything you'd like us to know. We **love** hearing from you!
- Is it time to **talk to your parents** about **creating their estate plan?** Read our tips for **talking about a will without getting kicked out of one!**
- How would you spend a **surprise $500,000 inheritance?** Let us know!
- Have you taken the time to **fund your trust?** Don't neglect this important task. Start today!
- **Small business owners** should check for the **assignment of business interest** document in their plans. **Reach out to us for a template if you don't have it.**