ISSUE #3

Monthly Newsletter

LEGAL JOURNEYS, LLC

March 2025

LEGAL JOURNEYS' NEW BUILDING

Marching Right Along...Moving to the End of Quarter One With SO Many Updates!!

March is upon us and we have jumped right in! We still have a few appointments available for March if you or someone you know is in need of an Estate Plan, but we are filling up fast, so don't delay!

With March beginning, we are looking forward to Spring and counting down the days, minutes, and seconds to springing forward (when are they going to do away with that, anyways?) for more daylight! We are also rushing to finish our new building, because at the end of this month, we will be officially **moving in to our NEW BUILDING!** You are **the first to know the new location!**

Along with a fresh building comes fresh blood to LJ....we have a new (to us) attorney joining us! **Rebecca Hill** officially joined Legal Jouneys March 1st. **You can find out more about her in the "LJ Updates" and "Staff Spotlight" later in this issue.**

February was, well...cold. It was eventful, though, and we **appreciate our past and present clients** for your referrals. Word of mouth, Facebook tags, and Google Reviews help our business grow and help us reach more people to **create peace and protection with excellence** for their families as we have yours.

This month, we are so excited to offer **TWO seminars for our Wills and Trusts 101 event.** We have one themed **Whiskey and Wills,** and one **Myths and Mistakes.** We also are excited to offer a **South Huntsville location** for one of these events.

Have something you'd like published in our newsletter? Send it to our Marketing and Relations Director at brandy@legaljourneys.com.

Legal Journeys Team - XO

In this newsletter you can expect:

St. Patty's Day & Estate Planning Myths

Legal Journeys News and Highlights

Funding Spotlight

Special Days- Birthdays, Anniversaries, etc.

Upcoming Events

Joke of the Month + TLDR

Estate Planning Myths as Misleading as Leprechaun Legends

Welcome to March, the month of Mardi Gras, Spring, Pi Day, and St. Patrick's Day. Here at Legal Journeys, with an owner of Irish decent, we love St. Patrick's Day, the green, and all the folklore surrounding it.

This St. Patty's Day, we're here to do a little myth bustin', some from St. Patrick and some from Estate Planning. So buckle your boots and shine your gold, we are going on a journey!

There are several myths surrounding St. Patrick's Day! Here are a few common ones:

1. **Myth: St. Patrick was Irish –** He was actually born in Britain and kidnapped by Irish raiders.
2. **Myth: He Drove Snakes Out of Ireland –** There's no evidence that snakes ever lived in Ireland; the story is likely symbolic of driving out paganism.
3. **Myth: Leprechauns Are Friendly –** In folklore, leprechauns are actually mischievous tricksters, not the cheerful, gold-giving creatures we see today.
4. **Myth: You Must Wear Green to Avoid Getting Pinched –** This tradition is mostly American, not Irish!
5. **Myth: The Shamrock Is the Official Symbol of Ireland –** The harp, not the shamrock, is actually Ireland's official symbol.

Just like these fun St. Patrick's Day myths, estate planning has its own misconceptions that can lead people astray.

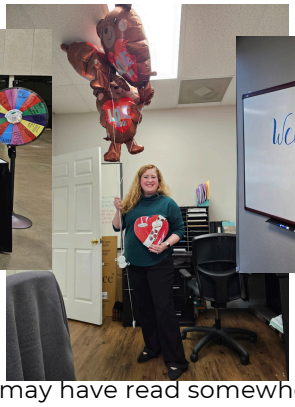
1. **Myth: I don't have enough assets for an Estate Plan –** an Estate Plan isn't a luxury reserved for the wealthy, it's a necessity for anyone who has things to protect or people who matter.
2. **Myth: My spouse and I trust each other completely, so we don't need an Estate Plan –** trust between spouses doesn't prevent legal complications or avoid court. There's also the issue of remarriage or accidental disinheritance.
3. **Myth: Estate Planning is too expensive –** Avoiding Estate Planning due to cost concerns can lead to far more significant time and money costs for people you love down the road.
4. **Myth: I don't need to worry about who would raise my kids –** Without a Kids Protection Plan, the decision about who raises your children would be left to a judge, and it may not be the person you would have wanted.

Want to know more? Scan the QR code to read our full blog on the common myths in Estate Planning!

- Levi

Call or Click for your appointment today!

www.legaljourneys.com	256-850-3431



Legal Journeys Updates

March is bringing so many new updates to LJ for our clients and friends. We have **staff changes and location announcements...and they're big**!

First up, we are elated to announce our **new attorney, Rebecca Hill**, has started with us as of March 1. She has been **practicing law for over 18 years**. Rebecca spent the first 16 years of her law practice helping families and small businesses navigate the uncertainty and overwhelm of Bankruptcy and Litigation. After years of helping her clients pick up the pieces after things fell apart, she transitioned her entire practice to the area of Estate Planning. Because of her years in litigation, she is now **passionate about helping families stay out of court and conflict**.

You may have read somewhere that **we have a new building**...well....we are ready to announce the location! Drum roll, please! **4192 Sullivan Street.** It's the old *Madison City Schools Department of Education Technology Building, and the Fire Station* next to it. We are currently planning to move in the last week of March, and **we are scheduled to open at the beginning of next month**. We plan to have an Open House when it's ready! We will also be offering a South Huntsville satellite location soon!

We had a great time at **Von Brewski**, shout out to **Abby Lee Casey and the Von Braun Center**! We also had the **cutest Girl Scout** come visit the office to do a presentation! Thank you, **Kinsey**, for being a great salesperson!

Special Dates

9 - Daylight Savings Time Begins!
Don't forget to Spring Forward!

10-14 - Spring Break MCS, MCSS, HSV Schools

13 - Wills & Trusts 101 Event
Whiskey & Wills @ Spenryn

14 - PI Day (3.14)

17 - St. Patrick's Day

18 - Office closed for Staff Appreciation Day

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

20 - First Day of Spring!

24-28 - Office closed for MOVING!!!

March 2025

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!
- **Office Closed for Moving!!** The last week of March, our office will be closed for packing and moving to our new building. Once we are fully moved, set up, and decorated, we will be announcing an Open House for all our clients to be able to come check it out!

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

Investment Accounts

Investments accounts, including stocks and bonds, need to be retitled in the name of the trust. If the institution doesn't allow this, you will list the trust as the payable on death beneficiary.

Homestead Exemption

If you haven't already, especially if you've had a trust done recently, you will want to reapply for your Homestead Exemption on your homestead property after it's placed in your trust. This is done at the Tax Assessor's office. It **can** be done online, but it's **best** done in person. If you need more information, reach out to brandy@legaljourneys.com.

Staff Spotlight

We are so thrilled to introduce you to our next staff member, Mrs. Rebecca Hill. She joins LJ from her own successful law firm beginning March 1. She has been a practicing attorney for over over 18 years, and began her own journey in Estate Planning in the Fall of 2023. You can find more information about Rebecca at https://legaljourneys.com/about-us/rebecca-hill//

Client To-Dos

How long has it been since you've reviewed your trust? At Legal Journeys, we offer complimentary reviews every 3 years to make sure your trust is up to date and will work for you when you need it most. Check the date on your trust and if it's March of 2022 or before and you haven't come in for your review, give us a call. Amendments start at just $250, and changes that have happened in the legal language are complimentary.

256-850-3431

Joke of the Month

What do you call a lion with no eyes?

Lon.

Where do bad rainbows go?

To prism, where they serve a light sentence.

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

TLDR

- Our **New Location** is 4192 Sullivan Street, Madison!
- We will soon offer a **satellite location** in **South Huntsville!**
- We have a **new (to us) attorney, Rebecca Hill!**
- Estate Planning has as many myths as St. Patrick's Day, **and we clear those up in our blog, *Fake News*:** https://legaljourneys.com/fake-news-4-estate-planning-myths-that-put-your-loved-ones-at-risk/
- If it's been **3+ years,** it's time to have your **estate plan reviewed.** Call our office today to schedule your **complimentary trust review**.
- If you or someone you know still **needs an Estate Plan**, **come to** one of our March events. Register here: www.legaljourneys.com/events