ISSUE #1

Monthly Newsletter

LEGAL JOURNEYS, LLC

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January 2025

LEGAL JOURNEYS TEAM

Welcome to our NEW and IMPROVED LJ Newsletter...we're glad you're here!

Welcome to our NEW and IMPROVED Legal Journeys Newsletter. We are so glad you are here for our stories, updates, and upcoming events. At the end of each newsletter, there will be a TLDR (Too Long - Didn't Read) section so you can get the highlights of the newsletter without having to read the whole thing!

We would like to thank all of our clients for trusting us. It is our ambition to provide peace and protection with excellence. Life is unpredictable, and we thank you for letting us help you and your loved ones prepare for life's most difficult moments.

Last year was full of ups and downs for our firm and personal lives. We said "Goodbye" to some beloved staff members and we welcomed some new staff members.

We had some great times at Toyota Stadium, hosted 5 education events, and participated in multiple community networking events. We wrapped up the year with Buddy the Elf, Elsa, Anna, and Santa and the other elves at the Huntsville Christmas Parade in the VIP area, sponsoring Letters to Santa.

In 2025, we are looking forward to more of the same, with some big news on the horizon. Keep reading to find out a big announcement! Also, if you have friends and family who need our services, please refer them to us. We love our clients and love when they refer us. And, if you don't already, follow us on Social Media. We have fun content and random giveaways! Happy New Year, Everyone!

Legal Journeys Team - XO

In this newsletter you can expect:

- Important Estate Planning Info
- Legal Journeys Updates
- Funding Spotlight
- Special Days- Birthdays, Anniversaries, etc.
- Upcoming Events
- Joke of the Month

Five Most Loving Things You Can Do For Your Family

It's a new year, which means a new chance to do what you've been putting off until the time is right.

The time is NOW! At some point, we are all going to die or become incapacitated; and while nobody likes to think about these things, the best way to NOT HAVE to think about it is to ***plan well***. Then, you can put it out of your mind and live life to the fullest, knowing your family will be taken care of if the worst were to happen.

That's why, in the month of January, we will be *giving away* the book Organizing for the Rest of Us by Dana K. White. This offer will be available for the **first 10 people** to come in for a **Life and Legacy Planning Session** during the month of January.

During your appointment, we will cover 5 of the ***most loving*** *things you can do* in the New Year for the people you love:

1. **Make a Plan:** A Will, Trust, Power of Attorney, Health Care Directive, and if you have minor children, a Kids Protection Plan so you don't leave your family with an expensive mess or unnecessary court proceedings if you become incapacitated or die unexpectedly.
2. **Include a letter or recording** of yourself for your loved ones.
3. Plan to pay no taxes.
4. Plan and pay for your funeral.
5. Get organized.

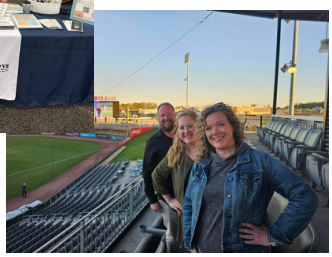
Leaving this as a roadmap for your family for when something happens to you will make things **simple and as clear as possible**. They'll know what you have, where it is, and how to find it.

Not sure if it's the right time? We offer free 15-minute phone consultations. Let's chat and see what your next step might be!

- Levi

Call or Click for your appointment today!

www.legaljourneys.com	256-850-3431



Legal Journeys Updates

Happy New Year to our clients and potential new clients! We had an adventurous 2024. We had some staff turnover, which led to some FANTASTIC new hires, dealt with some health issues, jumped into new business coaching with a company out of Atlanta, did a LOT of continuing education, had some educational events, community networking and sponsorships, gave SO MUCH STUFF away, and MORE!! We also have a BIG announcement that happened in 2024 that will be coming to fruition in 2025....***LJ will be in our own building - coming soon!***

As we are looking forward to what 2025 has to bring and planning for the future, our hope is to be in the new building and operational by the end of May. We will keep you up to date... look for an invite to see the new digs as soon as it's up and ready!

We are also gearing up for even more educational events, starting our webinars back up, client appreciation events, giveaways, expanding our case practice areas, and so much more! Keep your eyes on our future newsletters to see what's next!

Special Dates

1 - Happy New Year!
3- Peace & Protection in 2025 - Wills & Trusts 101 Webinar
10 - Office closed for Staff Vision Day
17 - Grand Opening Event @ Stovehouse
18 - Brandy's Birthday!
20 - Office Closed for MLK Jr. Day
Peace & Protection in 2025 - Wills & Trusts 101 Webinar
23 - Peace & Protection in 2025 - Wills & Trusts 101 In-Person Event (office closed 1/2 day for event)

Upcoming Events

- **Wills & Trusts 101 In-Person Event** Free Estate Planning Event. Free dinner, entertainment, and estate planning info. Limited childcare available. Register at www.legaljourneys.com/events
- **Webinars** - We will be having webinars on Friday, January 3rd and Monday, January 20th.
- **Grand Opening @ Stovehouse** - In partnership with Bank of Frankewing and their new location at Stovehouse! Come check out Bank of Frank and get free swag from them and their sponsors.

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

Bank Accounts

DO title your bank accounts in the trust. For each bank account:

- retitle each account into the name of the trust, OR
- list the trust as payable on death beneficiary.

Some banks allow retitling of the accounts, while some while only allow you to name the trust as beneficiary. Either is fine.

Vehicles

Do **NOT** transfer titles of any moving property (cars, boats, RVs, etc.) into the name of the trust. If you caused an accident, the trust could be sued.

After your passing, your trustees would take your "Assignment of Personal Property," Death Certificate, and car title to the DMV to transfer the title.

Staff Spotlight

First up on our staff spotlight is Levi Alexander. Levi is the founding attorney of Legal Journeys. He began his legal career in criminal law, then transitioned to family law before finally landing in Estate Planning when the aforementioned weren't fulfilling his need to help people. Personally, he is a husband, father to two boys, and a pup dad of three.

Client To-Dos

If you have a Kids Protection Plan, make sure you take it out and check the date. They are valid for one year. If yours is expired or expiring, call us for a renewal! Wondering about cost? Well, if you have no changes, we do that complimentary. If you want to make changes, it's $250. A small fee for peace of mind.

Joke of the Month

What do lawyers wear to work?

Law suits.

Humpty Dumpty had a great fall. *Winter wasn't too bad either.*

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

TLDR

- We have a new building! We will keep you informed of the progress.
- Some of the most loving things you can do for your family are making a clear and simple estate plan, and keeping it up to date, and we can help!
- January is jam-packed with events and special days. If you or someone you know still needs a will or trust, invite them to our January event on the 23rd.
- Current Trust Clients: remember, if you don't properly and fully fund your trust, you are walking around with an empty red wagon! We are here to help if you need us. If you have minor children, check your KPP date.

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