

HEADLINER: Where There's a Will There's a Way**ARTICLE TITLE: *The Season of Good Will(s)****A Time for conversations ...*

In this age of convenience and efficiencies of effort, many products advertise "set it and forget it". Sounds so good in our busy, sometimes harried lifestyles with family, work, and social obligations to lighten the load of things to attend to with "do-it-for-you products".

But estate planning is not one of those. Not set it and forget it but set it and tend to it – over time.

One of the many advantages in creating an estate plan, Trust or Will, is providing the basis for family harmony as part of your legacy. The certainty and clear direction that you provide with a well-thought out and executed estate plan is one of the greatest gifts to those who will support you and fulfill your directives, as well as to the family and friends your plan encompasses. When it comes to who you will rely on to support you or your estate, this is not something to wait for an "unveiling" after you pass, or a plan to be discovered in a time of emergency. It is a plan whose intended outcome is best assured if you talk with those involved about it now.

The holiday season is a prime opportunity to have such a talk, with many/most of the family already gathered. Be thoughtful in planning for and launching into such a talk, for your sake and theirs. Tell them in advance that you want to have this discussion. Set aside a quiet time and space, a brief spell apart from the flurry of festivities. Create an agenda for yourself to help organize your thoughts and to be sure that you cover what you want in the way you want to express yourself. Keep this first foray short. Its purpose is to convey that you have a plan. Allot time for this discussion and stick to the time. Maybe this first foray, having broken the ice, may lead to follow on discussion. Allow yourself the benefit of discovery and see how this unfolds and what more you and yours may benefit from in further discussion if such seems the case. Explain your intentions i.e. to provide clear direction and guidance to help them help you at some future date.

Talk process and framework, **not** content which is your private affair. Though discussions of death and incapacity can be awkward to initiate, often such conversations serve to bring the family closer. As well, you provide a model for your family to follow that can benefit them as they travel a similar path.

So, this season, whether you are having your holidays shared by Zoom or can gather in person, consider asking your family to set aside time to have this conversation with you.

Ask your estate planning attorney for guidance in preparing for a family discussion.

Stories of the Stars ... If Only ...

We'll be back in the New Year with stories of the foibles, follies and fantastic tales of prominent persons, celebrities—stunning stories highlighting "things gone wrong" that you can avoid by doing things right in your estate plan.

For this article I leave you with my wishes for a joyous season of warm friendship and family sharing in every innovative way this 2020 has called upon us to invent. For all its challenges 2020 has also deepened our sense of the importance of our connection to friends, family, cherished times, and cherished moments. We will be on the other side of the difficulties and distances this time of social distancing, and quarantine has imposed on us, and when we do, as we breathe a sigh of relief, let us celebrate our resilience and preserve the good that emerged in the value we placed or re-invigorated in the unmatched source of well-being that we have in the wellspring of our bond with each other – friends, family – the joy of hearing “that” voice, the purr of a snuggled cat, the never daunted wagging tail of the pup that accompanied us on our walks and kept our minds calm, those moments and many more that provided us some serenity when all else seemed up-for-grabs.

As this year comes to a close and you step forward into a new year, may your life grow in ways meaningful and fulfilling. Be well. Stay well. And thrive.

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Dear Reader ... We welcome your questions on matters related to estate planning. These will provide grist for future articles and enhance the potential for those articles to be of interest and value to you.

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