



InSight Into Estate Planning Newsletter

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Bobby's "Message in a Bottle" to His Baby Daughter

When you become a parent, the realization hits you that you are responsible for molding and developing another human being. And not just anyone; a part of you. *Your child.*

Bobby Feisee decided to pass down some important words of wisdom in a proverbial "message in a bottle" to his daughter, Nava. Just taking a few moments to contemplate passing on life lessons was an emotional experience.

"When I sat down to write this letter I did not expect to get emotional, but when I stared at the screen to think about what I would say I realized I will not always be here with [her]," said Bobby.

Some of the lessons he includes in his message were taught to him by his parents, siblings, teachers and friends. Others were hard earned lessons that cost him dearly with either time or money.

This "Message in a Bottle" exercise is a way to put your voice into your planning. Although we offer "legacy planning" services at InSight Law, only a small percentage of our client base opt for this form of planning. Although there are some additional legal fees that apply, I believe the benefits far outweigh the costs of this type of "Purposeful Planning."

There are several ways to integrate your voice into your planning:

1. Audio and/or conversations where we go through carefully designed questions on various topics and preserve the conversation for future generations; and
2. Actually weaving in your legacy statements and comments throughout the trust document where appropriate.

Clients interested in learning more may contact Bobby directly to discuss your options.

[Read Bobby's full message to his daughter here.](#)



Client Update Season is in Full Swing!

Your estate plan should be updated at least every two years. If you are a client, as part of our InSight Law Maintenance and Education Program, your estate plan will be reviewed and updated.

Our team has completed four update sessions so far and we have one more to go.

Client UPDATE

The key updates this year deal with:

1. New tax provisions dealing with the concept of **Portability**;
2. Dealing with your **Digital Assets**
3. Building in flexibility if you need to qualify for **Medicaid**;
4. Reinforcing the concept of the **Trust Protector**.

The updates have run smoothly. However, we want to remind you of the following tips to ensure an efficient update for your plan:

1. **When we send out your Estate Planning Review Worksheets (EPRW) in the summer, please make sure to read it carefully and add any changes at least a month before you schedule your program.**
 - Some of our clients have decided to make changes on the actual program date which could have been avoided if these changes were sent to us prior to the meeting. It takes away valuable team time and adds expenses to the firm when we need to re-print the legal documents. Even if you don't have any changes, please sign and return the EPRW to our office.
2. **If you don't understand a provision of your EPRW then call the firm well before the program so we can discuss with you.**
 - As you will recall phone calls are included at no additional charge. However, if you have a counselling issue to discuss with the firm, then schedule a Personal Counselling Review so we can make sure the issue is handled. Remember, we charge for counselling and not for word processing.
3. **If you are married, please remember that both spouses must attend the session together.**
 - If one spouse fails to attend the session you registered for, we have to re-print all of the legal documents and arrange a new time to witness and notarize everything properly. Again, this takes away valuable team time and adds expenses when we have to redo all the documents.

The InSight Law Family Continues to Grow

Introducing the newest member of the InSight Law team: **Ella Norrington**.

Firm attorney Jesci Norrington and her husband welcomed Ella to the world at the end of July and have been in love ever since.

Jesci is currently out of office on maternity leave, but will be sure to get her estate planning documents up to date upon her return.

Congrats Jesci!



[Attend an InSight Event](#)

Truth About Estate Planning (Morning Session)

Date: September 21, 2016

Time: 10:00 am - 12:00 pm

Location: InSightLaw's Ashburn Office

Description: Most people don't know what to expect from an estate planning attorney, let alone know the right questions to ask. In our experience, most families who have completed their estate plans don't fully understand their legal documents and the serious impact it can have on their loved ones. The Truth About Estate Planning™ Program will prepare you to deal with your planning concerns and examine your goals without the time pressure of making decisions.

[Register Here](#)

Truth About Estate Planning (Evening Session)

Date: September 21, 2016

Time: 7:00 pm - 9:00 pm

Location: InSightLaw's Ashburn Office

Description: In an effort to accommodate as many different schedules and lifestyles as possible, we hold an evening session of The Truth About Estate Planning™ Program for prospective clients who cannot attend the morning session.

[Register Here](#)

Truth About Business Planning

Date: October 5, 2016

Time: 7:00 pm - 9:00 pm

Location: InSightLaw's Ashburn Office

Description: Join us for a free educational event about business planning. Learn about a Three Step Strategy for you to design and implement a plan for your business!

[Register Here](#)

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Offices in Ashburn and McLean, VA and Denver, CO

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