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Estate Planning & Business Succession



Your Estate Planning, Asset Protection, & Family Business Succession Attorneys



Personal Note

Hi Everyone!

This is **Estate Planning & Asset Protection Attorney, Leslie V. Marengo** to bring you our newsletter and to *THANK YOU for all your REFERRALS!*

Wow! It has been an interesting couple of weeks in the news huh?! ☐ The Game Stop - Robinhood saga was quite eventful and continues to raise questions about the stock market, Jeff Bezos' surprised us when he announced he is stepping down as CEO of Amazon, and the new invite-only chat app "Clubhouse" is all I hear about... especially after Elon Musk decided to stop by causing the stock price to surge.



Has anyone tried this app? Shoot me an email (*just hit Reply*) and let me know what you are listening to on there. I downloaded the app, but I haven't had the time to really check it out. From what I gathered, it's kind of like listening to a podcast but all the people involved are talking LIVE via their phones. They

don't see each other, so it really is like listening in on a phone call... but in a non-creepy type way! Not quite sure about it yet... ☐

In other news, as the Covid vaccines ☐ slowly make their way into more and more American arms, we are here to remind you that our estate planning services can help *inoculate you and your family against inheritance surprises or disputes!* ☐

Now is as good a time as ever to show your loved ones you care by ensuring you have proper planning in place so that they are not left with a mess to clean up in the event of your incapacity, illness, or death. **So like we do every year around this time: if you are one of the first 5 families to schedule a Family Wealth Planning Session we'll waive our regular \$750 strategic planning session fee & gift you a box of my favorite chocolate-covered strawberries!** ☐ To book a Family Wealth Planning Session you can call or email our Client Services Guru, **Juliana** at [Hello@trustcounsel.com](mailto>Hello@trustcounsel.com) / **305.707.7126**. Don't forget to mention this newsletter to get your goodies!

To your family's continued Health, Wealth, & Happiness!

-Leslie

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Featured Article

Lessons From Kobe 1-Year Later

It may seem like a distant memory due to more recent events like a global pandemic and a presidential election, but it has

only been ONE year since NBA legend Kobe Bryant and his 13-year-old daughter, Gianna (“Gigi”), tragically passed away in a helicopter crash in Calabasas, California. At the time, little was known about the estate



planning strategies that Kobe had in place to protect and preserve his estimated \$600 million estate for his wife, Vanessa, and three surviving daughters, Natalia (17), Bianka (3), and Capri (1). Since then, court filings made by Kobe’s widow have shed light on both the successes & failures of Kobe’s planning efforts.

On the positive side, Kobe created an extensive estate plan, which included a Trust to protect his assets, reduce estate-tax liability, and pass on his wealth to his family. On the other hand, Kobe didn't keep his plan updated and baby Capri was accidentally left out leaving Vanessa having to go to Court to request a judge to intervene.

□ □ □

Leslie's Lesson:

Estate planning is not a one-and-done type of deal — your plan must continuously evolve to keep pace with changes in your family, the law, the tax code, your assets, and your life goals.

Keep Reading the Article...

Thank You!

We would like to give a BIG
"Thank You" this week to:

*Bridgette A.
Alberto A.
Katheryn S.*

Carl M.
Liz P.



We truly appreciate your ongoing
REFERRALS and **TRUST** in us!

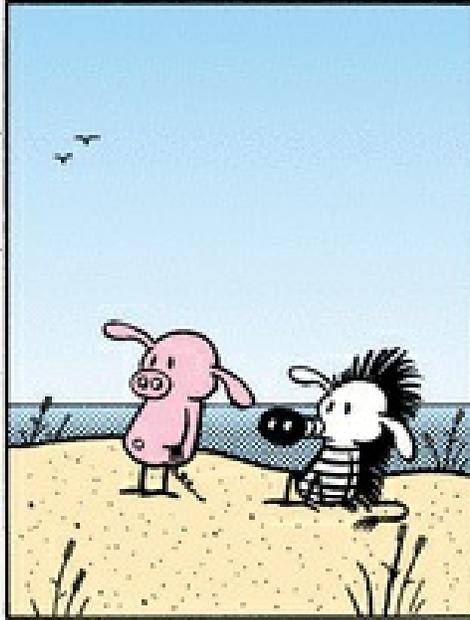
*DO YOU KNOW SOMEONE WHO NEEDS TO
PROTECT THEIR FAMILY & THEIR ASSETS?*

Send us your introduction here!

****Your referrals are the highest form of professional compliment!**

Funnies





PEARLS BEFORE SWINE
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Take the Plunge!

GET ALL YOUR *DUCKS IN A ROW* & KEEP THEM THERE!



Estate Planning can be complex...
but our approach isn't!

It is so important to protect yourself, your family, and your assets!

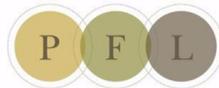
Taking the first step is usually the hardest part.

Call us today at:

305-707-7126

to get started or email her by clicking below

Email Client Services



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