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Estate Planning & Business Succession



## Your Estate Planning, Asset Protection, & Estate Administration 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**.

How is your summer going so far?

If my social media feed is any indication, lots of you are enjoying long overdue travel, ✈️ and the top picks for vacation destinations this year appears to be Ireland, Alaska, and Greece! Many of you also seem to be experiencing long flight delays and lots of lost baggage so the best advice seems to be to pack light and be patient.



Meanwhile, did you know that July is National Sandwich Generation Month? If you have never heard the term "Sandwich Generation" let me explain. As parents get older and begin to lose their independence, many will turn to their adult children to help them. But for adult children already caring for young kids of their own, this new role of "caregiver" can be difficult. Caring for children and parents simultaneously, they are literally 'sandwiched' between the pressures of raising a family, holding down a job, and managing mom or dad's growing medical and financial needs. Of course, Gen Xers are much more likely to be in that predicament than most Millennials, so hats off to them!

For my people, the Millennials (yes, although I am NOT fond of the lingo, I'm apparently considered a "Geriatric Millennial"), July is also notable as that is when the Social Security Board of Trustees' annual report comes out. Every year it is reported that Millennials will probably collect less in Social Security than their parents or grandparents ... but this year they've announced that the program's old-age trust fund will start to be depleted as early as 2035! They are forecasting that by then, Social Security will be able to pay only 77% of promised benefits as current demographics are driving the program into a deficit, a trend that is projected to continue. Sounds like **now** is the perfect time to catch up with your financial advisor to make sure retirement doesn't find you unprepared!

This week we are bringing you an interesting article written by my friend **Carol Kaufman of Pinventory.com** about how to search for money from a loved one (or maybe your own money) that may be lost or being held in your state's unclaimed property database. It is good practice to check these registries regularly and Carol tells you how. **Let me know what you find!** 💰

As always, don't hesitate to hit **"REPLY"** to this email and share your thoughts with me on the article, or anything at all!

To your continued health, wealth, & happiness,

*-Leslie*

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### Featured Article

## Are You Leaving Your Money On The Table?

More than \$58 BILLION dollars of assets have been "escheated", or "confiscated", by state governments in the US, and are just sitting in state funds, awaiting your retrieval. Even more has yet to be recognized. The State of Florida, for example, currently holds an estimated \$2 billion worth of unclaimed money that can be claimed by their owners any time.



People forget about property and assets they own. Additionally, people don't know that their loved ones have or had assets and, even if they were told, they may have forgotten where they are.

And that's where NAUPA.org and MissingMoney.com come in. They help, FOR FREE, to help you find money and assets you've lost or forgotten about! These assets are called... [Keep Reading](#)

### Office Ongoing

Please help us wish our Legal Assistant Mattia a

**Happy Birthday!**



### Thank You!

We would like to give a BIG

**"Thank You"** this week to:

*Daniel V.*

*Evelyn C.*

*Michelle C.*

*Fernando H.*

*Omar T*



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



### Take the Plunge!

**GET ALL YOUR DUCKS IN A ROW**

**& KEEP THEM THERE!**



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

*Protect yourself, your family, and your assets!*

The first step is the hardest part.

**Book your Family Wealth Strategy Session Today.**

What is a **FAMILY WEALTH STRATEGY SESSION?**

This is a **90-min strategy session** where we cover your specific situation and how you can protect your family from creditors and predators. At a minimum, you walk away more organized than ever before.

Call us today at:  
**305-707-7126**

or

**CLICK BELOW to LINK TO MY CALENDAR!**

**BOOK YOUR STRATEGY SESSION NOW!**



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