

# C.A.R.e Plan

PROTECTING WHAT MATTERS MOST<sup>®</sup>

*This newsletter is for our CAREPlan estate planning clients. We hope you find it helpful and welcome your comments and suggestions.*

## Comment

### The Year of Education

In this odd-numbered year, we are dedicating our CAREPlan services to educating our clients and their families. As a CAREplan client, you are entitled to attend any of our educational programs for free. We also encourage you to have the family members named in your plan attend one of our Successor Trustee Training programs. See the back page for dates and times of upcoming programs.

### The Importance of Funding

In every year, we strive to make sure your trusts are fully funded. A funded trust is one that has appropriate ownership or authority of all of your assets. In January or June of every year you receive a Funding Worksheet letting you know what information we have as to your funding. Please make sure you review it and return it to us with any changes we need to record. Also make sure it includes ALL of your assets, because we can't help you fund it if we don't know about it.

### Save The Date For Our Picnic

Our Annual Picnic is scheduled for September 10, 2011 in Arvada. Look for more details in future mailings.

### Check Out Our Website and Blogs

Our website is [www.coloradoestateplanning.com](http://www.coloradoestateplanning.com). Check it out for a copy of the Denver Business Journal article quoting Karen and other new information. Karen's professional blog is at [www.legacyplannerblog.com](http://www.legacyplannerblog.com). She also occasionally posts to her personal blog at [www.alwayspracticing.com](http://www.alwayspracticing.com). Her personal blog contains news of her family, favorite recipes, etc.

### Facebook and Other Social Media

We hope you'll "Like" us on Facebook. Our Facebook Page is under Karen Brady & Associates, P.C. Karen also has some videos on Youtube under the username BradyandAssoc. Karen's Twitter account is @karenbradylaw. Our Avvo profile is at [www.avvo.com](http://www.avvo.com) under Karen L. Brady. Karen's LinkedIn account is under Karen (McGee) Brady. If you can't find us after all that, perhaps it wasn't meant to be.



# UPCOMING CLASSES:

2011  
A Year for  
Education



Our CarePlan classes for 2nd quarter 2011 include:

## SUCCESSOR TRUSTEE WORKSHOPS

Saturday, June 11th, from 1:00 p.m. to 3:00 p.m.

Saturday, July 16<sup>th</sup> from 9:30 a.m. to 11:30 a.m.

ESTATE PLANNING BASICS (Spread the word to prospective clients or others who aren't yet on our CAREPlan)

Saturday, June 11th from 9:30 a.m. to 11:30 p.m.

Saturday, July 16<sup>th</sup> from 1:00 p.m. to 3:00 p.m.

**PLEASE CALL AT LEAST 3 DAYS IN ADVANCE TO RESERVE YOUR SEAT.**

**Also Save the Date for our Picnic on September 10<sup>th</sup>!**

CAREPlan clients are entitled to funding assistance, special educational programs (see previous page), no charge wordprocessing changes, and no charge telephone consultations. Give us a call if you need any assistance updating or understanding your estate plan.

On the schedule to the left are some upcoming dates for our successor trustee workshops. These are group programs in which your successor trustees, beneficiaries, trusted advisors and others learn how a trust works and how trusts are administered when the trustmaker is disabled or dies. You may also wish to attend if you'd like a refresher on the basis of trust planning. Call at least 3 days in advance to reserve your seat.

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