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Piece Of Mind

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What Will Be Your Legacy?

A REFLECTION ON HOW THE PAST CAN SHAPE THE FUTURE

August is "What Will Be Your Legacy?" month, a time to pause and reflect on the imprint we'll leave behind. Not just in terms of finances and possessions but also in the values we uphold, the relationships we nurture, and the stories our families carry with them.

One figure who embodied the idea of legacy in every sense was George Washington. Known as the "Father of His Country," Washington's legacy wasn't built solely on military victories or political achievements. It was built on character.

At the end of the Revolutionary War, Washington had every opportunity to seize power. Some even wanted him to become king. Instead, he did something extraordinary: He voluntarily relinquished command of the army and returned to private life. Later, after serving two terms as the first President of the United States, he again chose to step down, setting the precedent for peaceful transfers of power that continues to this day.

His Farewell Address, written in 1796, wasn't a legal document or a political maneuver. It was a heartfelt letter to the American people, a reflection on unity, virtue, and the responsibilities of citizenship. That letter became part of his enduring legacy, reminding future generations not just what he did, but *who he was*.

So, what does this have to do with estate planning?

When most people think about their estate plan, they think about distributing assets: who gets the house, accounts, and family heirlooms. And while that's certainly part of it, a true legacy is about much more than wealth.

A legacy is the example you set, the values you instill, and the relationships you build over a lifetime. It's the story others will tell about you and what future generations will remember.

That's why it's worth taking a moment to consider questions like:

- What do I hope my family and loved ones will remember about me?
- Are there values, like kindness, perseverance, and generosity, that I want to pass down?
- How do I want my family to feel when they reflect on how I handled things?
- Am I living today in a way that reflects what matters most?

These aren't easy questions, and there are no one-size-fits-all answers. But considering them can give deeper meaning to your planning. It helps move the conversation beyond taxes and titles into something more lasting and human.

You don't need to be a founding father or a public figure to leave a meaningful legacy. You're already shaping one daily in how you lead your life, care for your loved ones, and prepare for the future.

Sometimes, a legacy is a charitable gift or a family story written down for future generations. Others, it's the peace you leave behind by ensuring your affairs are in order so your loved ones don't have to carry the burden of uncertainty or conflict. It can be as simple as a handwritten letter with your estate plan, expressing love, gratitude, or life lessons.

We've seen how thoughtful estate planning can be a powerful way to reinforce family unity, prevent confusion, and carry forward the values that matter most. But it starts with reflection on what you've built, what you believe, and how you want to be remembered.

So, as August reminds us to ask, "*What will be your legacy?*" take time to reflect not just on what you're leaving behind, but on what you're living out today. That, more than anything, is what shapes the future.

-J.M. Preston

A Forgotten Bank Account, \$27,492, and a Big Lesson in Estate Planning

Also Known As: 'Surprise! You Inherited a Bank Account ... in Ohio'

It happens more often than you'd think:

A parent passes away, the family is sorting through paperwork, and someone stumbles upon an old envelope from a bank no one's ever heard of. Inside? A forgotten savings account. Balance? \$27,492 and 13 cents.

Cue the dramatic music.

This client told us her father never liked "putting all his eggs in one basket." So, he opened accounts in three different banks, across three different states, and never told anyone. Years later, she spent more time trying to access those accounts than settling the rest of his estate.

While it makes for a good story, it also highlights a common estate planning oversight: Even the best plan can't handle assets it doesn't know about.

Here are three tips to make sure your "secret account" doesn't become your family's next scavenger hunt.

- **Keep an updated Asset Detail Report.** Include all bank accounts, retirement accounts, life insurance policies, real estate, and digital assets (like crypto). Store it with your estate planning documents and/or share it with your successor trustee.
- **Consolidate when possible.** If you have old or unused accounts, consider

consolidating them. Fewer accounts mean less confusion later.

- **Don't forget digital access.** Many accounts today don't send paper statements, so make sure your trustee knows how to access your digital life — your passwords, cloud storage, and online banking.

The bottom line? If you've worked hard to build your life, make sure your loved ones won't need a detective to figure it out.

Because while discovering a mystery account might sound exciting, trust us: It's only fun in the movies.

Sandwich Generation Stress

Smart Strategies to Survive the Caregiving Years

Caring for children and aging parents can be stressful for the generation in the middle, leading to heavy workloads and round-the-clock worries.

Nearly 1 in 4 American adults are shouldering those duties as part of the sandwich generation — that is, they have at least one parent over 65 and are raising a child under 18 or supporting an adult child financially, according to Pew Research. These cross-generational responsibilities can easily leave a caregiver feeling swamped and stressed out. However, family-care experts have provided three strategies for navigating this challenging stage of life.

Self-Care Essentials

Neglecting your own physical and mental health is a mistake, not only for your sake but for ensuring you have the inner resources you need for your family. One social worker told Care.com, "You can't pour from an empty cup." If you simply can't find time for a break to exercise, read, or chill with friends, ask a spouse, another family member, or a friend to take over caregiving duties so you can get away. If you need support or space to vent, look for a caregiver support group through a local aging agency, hospital, or senior-care facility.

Streamline Tasks

Plan to delegate chores, such as driving the kids to sports practice or taking Mom to a doctor's appointment. To avoid constantly updating family members on a loved one's status, set up a group text or shared Google Doc. Family-focused platforms such as Lotsa Helping Hands offer more elaborate information-sharing functions and can be especially useful during crises.

Non-Negotiable Needs

You may never attain a sense of balance during this life stage. As one caregiver says, sometimes it's all about putting out fires, and that's okay! But don't surrender your own needs entirely! Identify the activities you simply cannot give up without sacrificing your mental health, such as regular exercise, time outdoors, or coffee with friends. Make time for these pursuits by enlisting others to help or paying for professional care.

Remember that the difficult, unpredictable labor of family care you provide can make a huge and enduring difference in your loved ones' quality of life. And that is a purpose well worth pursuing!

A Taste of Home

CREATE A FAMILY
COOKBOOK FULL OF
LOVE AND FLAVOR

In most families, holidays, special occasions, and Sunday dinners usually revolve around laughter and food — lots of food. Whether it's Grandma's famous biscuits or that secret chili recipe your uncle swears he'll take to the grave, these dishes are part of what makes your family your family. So, why not gather all those delicious memories into one place by creating a family cookbook?

Know your why.

Before you dive in, decide what your cookbook is for. Is it a holiday gift? A legacy project? A fun way to organize weeknight favorites? Knowing your purpose will guide the tone, design, and care you put into it.

Gather the goods.

Now comes the fun (and sometimes chaotic) part — tracking down recipes from relatives. Send a group text, email, or social media post asking for their go-to dishes. Encourage everyone to include personal stories, tips, or funny kitchen mishaps. That's the good stuff that makes your cookbook meaningful.

Choose an organizational style.

You could go the traditional route with categories like appetizers, mains, and desserts, or get creative with sections like "Grandma's Greatest Hits," "Cousin Potluck Favorites," or "Holiday Classics." Just pick a format that feels natural and easy to follow.

Test and tweak as you go.

Some family recipes live in the land of vague directions — "a dash of this" or "cook until it smells right," etc. If needed, test the recipes and jot down more precise measurements or instructions. Trust me, your future self will thank you.

Add a personal touch.

Photos can take a cookbook from good to unforgettable. Include pictures of the dishes, handwritten recipe cards, or candid family cooking moments. Even simple design details — like using someone's handwriting or a family saying — can make it feel special.

Pick a format.

You don't need to be a professional designer to pull this off. Tools like Canva, Shutterfly, or even Microsoft Word can help you create a layout. Decide whether you want to print physical copies, go digital, or do both.

Don't forget to embrace imperfection.

Remember, it doesn't need to be perfect! A little mess here and there adds charm. What matters is preserving the joy, tradition, and flavor of your family's kitchen.

Sudoku

					2			
				9			7	
5		9	3	4		6		
		7				4		
4	9	2				5	6	7
		5				3		
		6		5	4	7		1
	3			8				
			9					

Solution on Pg. 4

Summer Chickpea Salad

Inspired by HowSweetEats.com

Ingredients

- 2 (15-oz) cans chickpeas, drained and rinsed
- 4 green onions, thinly sliced
- 2 ears grilled corn, kernels cut from the cob
- 1 pint cherry tomatoes, quartered
- 3 tbsp chopped fresh basil
- 2 tbsp chopped fresh chives
- 1/4 tsp salt
- 1/4 tsp pepper
- 3 tbsp olive oil
- 2 tbsp red wine vinegar
- 1 1/2 tbsp honey
- 3 garlic cloves, minced or pressed
- 1 lime, zested and juiced

Directions

1. In a large bowl, combine chickpeas, onions, corn, tomatoes, basil, and chives.
2. Toss well with salt and pepper and set aside.
3. In a small saucepan over low heat, add oil, vinegar, honey, garlic, lime juice, and zest.
4. Whisk until the mixture is warm and garlic begins sizzling.
5. Pour over the chickpea mixture and toss well to coat.
6. Cover with plastic wrap and refrigerate for at least 30 minutes before serving.

1	4	8	7	6	2	9	5	3
6	2	3	5	9	8	1	7	4
5	7	9	3	4	1	6	2	8
3	1	7	6	2	5	4	8	9
4	9	2	8	1	3	5	6	7
8	6	5	4	7	9	3	1	2
9	8	6	2	5	4	7	3	1
7	3	4	1	8	6	2	9	5
2	5	1	9	3	7	8	4	6

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Inside

- 1** Why Your Legacy Starts Now
- 2** The Case of the Secret Bank Account
Stuck in the Middle: Managing
Sandwich Generation Strain
- 3** Cook Up a Legacy
Summer Chickpea Salad
- 4** Nantucket's Timeless Allure

The information provided in this newsletter does not, and is not intended to, constitute legal advice; instead, all content contained herein is for general informational purposes only.



WHALES, WINE, AND WHIMSY

WHY NANTUCKET SHOULD BE YOUR NEXT GETAWAY

When many Americans think of vacation destinations, they envision beautiful state parks, sunny beaches in Florida or California, and the mountains of Appalachia and the Rockies. However, many states across the country offer exciting events and beautiful scenery. If Massachusetts isn't already on your radar, consider giving it a closer look the next time you plan a vacation. Cape Cod has beautiful beaches and a rich history that many don't know about, and something exciting is always happening in Boston. But if you want to experience the true essence of Massachusetts, take a trip to Nantucket.

Nantucket is a small island, only 14 miles long and about 3.5 miles wide. Its history with European settlers goes back over 500 years. First sighted by an Englishman named Bartholomew Gosnold in 1602, the island was settled by colonists 50 years later in 1659. Not long after, they spotted whales offshore, which put Nantucket on the map. Whaling became the ultimate trade for people living in the area, and the island even became the world's whaling capital until the 1850s. You can still view whales from the island today, and if you want to get the full story, check out the Nantucket Whaling Museum.

If whale watching and museum touring aren't your thing, you can pursue other exciting activities around Nantucket. The island is bike-friendly, and many trails will take you by all the best sights. Many one-of-a-kind boutiques occupy beautiful historic buildings, and there's even a public golf course that will leave all your golfing buddies jealous. If you go in May, you may even experience the renowned Wine & Food Festival.

Nantucket is full of historic architecture, beautiful scenery, and friendly people. You might even see a famous face during your visit! This is a vacation you'll be talking about for years to come!