

# Planning for Life

Providing Peace of Mind

LAW OFFICES OF DAGMAR M. POLLEX, P.C.

## Priceless Memories: The Story of Our Lives

Summer 2007

During the past year I have had the opportunity to work with a group of estate planning colleagues on a Legacy Builders Project. This project is designed to train, equip and support professionals to become a resource in helping families and communities preserve their heritage, family history and legacy.

This project is part of the Legacy Builders Institute, a national not-for-profit organization dedicated to the goal of creating easy-to-use, simple tools to help people preserve their most meaningful legacy – **a legacy that is more than leaving our assets to beneficiaries.**

It goes without saying that money and property are only part of what we have to share with others. Our real wealth is the living declaration of who we are as a unique human being – of the path we have traveled in our life, and the bridge of values, vision, wisdom and experience that we have to offer our loved ones. Our legacy includes the priceless memories we have collected from the experiences of life's lessons – our ups and downs, losses, pains and joy.

Sometimes we forget that we have much to offer. There was a time in our history when the wisdom of "elders" was listened to with respect and learning. There was continuity in a family's sharing of history, life lessons, beliefs and ideas.

Today, families are often more scattered and the pace of life seems to be accelerating more and more rapidly. This makes it more challenging for families and communities to share their history, important milestones and values, family traditions and experiences with the next generations.

(cont. on p. 2)

## Personal Notes From Dagmar

My son Eric is starting his 3d year of law school at NYU and spending the first semester studying at the University of Capetown Law School in South Africa. In June, my daughter Sarah graduated from the JFK School of Government at Harvard with a Master's in Public Policy. Both of them are doing great things! Jennifer Rubin will be back with us this Fall after her maternity leave. She and her husband, Jeff Walker, are the proud parents of Benjamin Walker.



### Legal Notes

If you ever have a question about your planning, give us a call. We never charge for phone calls because we want to make it easy for you to get the information you need.

And if you haven't had your estate plan check-up yet, give us a call.

There have been some very important changes in retirement plan rules and long term care planning in the last few years!

---

## Priceless Memories: The Story of Our Lives (cont.)

Often, it's hard to know how to begin and writing can be a daunting task to some of us. In the meantime, "time flies", as the saying goes, and all too often we let the years go by without offering the best of us, even to those we love the most.

The truth is that this does not have to be overwhelming! Preserving family memories can be done in a variety of simple ways, including writing a simple "love letter" like one that a client recently wrote.

In this letter to her children, she wrote about her childhood experiences, the values she developed as a young adult, some turning points in her life and what she hoped for her children. She ended this simple 3-page letter by telling them how much she loved, respected and admired the young adults they had become. She decided to share the letter with them and told me that it was the catalyst for some wonderful family discussions. Now her children have started on doing the same for **their** children.

If you are interested in getting started, we have put together a variety of simple tools, both written and audio, that make it easy for anyone to create a most valuable gift of legacy. One of the newest tools is one that I am very excited about. This is a very powerful, yet simple tool that enables us to easily create an audio recording of an interview with you. Then your stories will be heard by your children, grandchildren and great-grandchildren, in your own voice.

Give us a call if you'd like to learn more about the process of leaving the most valuable gift to your family..... you!

According to a recent landmark survey of U.S. adults, 75 % considered passing along "values and life lessons" to be the most important element of legacy for themselves. This was true for baby boomers as well as post-retirees.

## LAW OFFICES OF DAGMAR M. POLLEX, P.C.

45 BRAINTREE HILL PARK  
BRAINTREE, MA 02184  
TEL: 781-535-6490

POLLEXESTATEPLANNING.COM