

November 2024
Issue

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OFFICE LOCATIONS

Multiple office locations for your convenience.

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Hours: M-TH 9:00 AM - 5:00 PM,
F 9:00 AM - 12:00 PM

UPCOMING SEMINARS & WEBINARS

	Plan Now To Protect Your Loved Ones	Tuesday, November 5th at 11:00 AM	 Scan to register
	The Corporate Transparency Act	Thursday, November 14th at 10:30 AM	 Scan to register
	Plan Now To Protect Your Loved Ones	Tuesday, November 19th at 11:00 AM	 Scan to register
	7 Secrets You Need To Know	Wednesday, November 20th at 10:30 AM	 Scan to register

A New Community! A New Opportunity!
About Vanguard Landing

This month, we are thrilled to provide an update on Vanguard Landing, an intentional special needs community for developmentally and intellectually disabled adults to be located in Virginia Beach. The founder of Vanguard Landing, Debra Dear, is a long-term client of Alperin Law, and Scott served on its board of directors for several years. Many of our clients who have special needs children often worry about the care and oversight that they will receive as adults after their parents can no longer provide for their care and support. Enter Vanguard Landing, a nonprofit organization whose mission is to provide a place to live, work and socialize for our fellow citizens who happen to have an intellectual or developmental disability. The organization started in 2007 after Debra Dear learned that there were very few resources and opportunities available for adults with intellectual disabilities after they left the school system. Could you imagine if life culminated at the end of high school? Determined to combat this gap, Debra conducted three years of research that led to her discovery of and visit to several intentional communities in other parts of the country. Armed with the support of these other communities, she formed a small group of affected citizens and launched the non-profit in late 2010. It has been a journey of twists and turns over the past 15 years-- from finding the right land to raising startup capital to obtaining financing and to securing the right development team. We are pleased to report that, after overcoming many delays, roadblocks and hurdles, CONSTRUCTION OF VANGUARD LANDING IS FINALLY UNDERWAY! Vanguard Landing is modeled after other similar long-standing and successful ventures around the country. It will be the first of its kind and scope in the Commonwealth of Virginia. There will be several types of residential offerings for the residents to choose from, multiple places to be employed both within the community and in the surrounding area and many activities and educational endeavors in the programming to create a full and robust life for those that choose it! Vanguard Landing has a solid business plan in place to sustain itself once open. They are in the second half of an Initial Capital Campaign of \$8 million. They raised \$4 million to garner a construction loan to build Phase one to house 128 people and now are working on a second \$4 million capital campaign to finish Phase One and build the foundation for additional offerings in the plan such as a Sportsplex Gym and an enterprise building among other amenities. For those interested in residential opportunities for their developmentally or intellectually disabled loves ones or if you wish to provide support for this much needed and long overdue project, please contact Debra Dear at 757-477-3580.



“Reel” America: Celebrating National Movie Month

Helping You Write Your Legacy Script

Humans are driven by stories. Since our earliest days, we have told tales that serve to inspire, connect, teach, and help us explore life’s most profound questions. From “once upon a time” to “happily ever after,” we cannot resist a good story. Storytelling is deeply wired into our minds and perhaps our very nature. You can tap into this human propensity to organize the world into narratives that explain, guide, and give meaning to our lives by using a story-centric approach to estate planning.

The Estate Plan as Legacy Script

Every great movie starts with a script, and every script starts with a story. Although each story is different, screenwriters typically follow a format that brings together three key elements: characters, conflict, and resolution. These elements, artfully woven together, create an engaging narrative that moves the story forward and, in the end, delivers a sense of closure.

Characters

If you are the main character in your movie, then your loved ones, or beneficiaries, may be among your supporting characters. On-screen and in an estate plan, supporting characters are just as important as the main character. They add depth to the story and are integral to the main character’s experiences. Without them, the narrative would fall apart.

As your attorney, it is essential that we get to know not only you (the main character) but also learn as much as possible about your beneficiaries (the supporting characters) so that we know what motivates the you and how we can draft the best plan for your future.

Conflict

Conflict is the foundation of any good story. It identifies the challenges the characters face, introduces tension, and forces the main character to take actions that move the story toward resolution. Conflicts are by their nature unpleasant and uncomfortable, which is what makes them so impactful. A conflict does not have to be bad, but it is hard to tell an engaging story when the characters have no obstacles to overcome. No family is conflict-free. There may be an antagonist in the family, such as an individual with a substance abuse disorder who requires special planning considerations. Or it could be more mundane interfamily squabbles over things like money, favoritism, and resentment that rear their ugly head.

For attorneys, applying the narrative element of conflict to estate planning means finding out, carefully and sensitively, potential interfamily issues that need to be addressed.

Resolution

A story’s payoff comes in the form of the resolution, when the characters overcome obstacles, tie up loose ends, and end the story. The resolution usually takes up very little screen time relative to the time spent fleshing out the characters and conflicts, but it is what everything has been leading up to. Writing a strong estate plan, like writing a strong resolution, can be tricky. It involves coming up with an ending that ties the story’s other elements together and is emotionally satisfying. There’s nothing wrong with a plot twist—as long as the resolution provides a sense of closure. The resolution of the estate planning process is a set of documents, like a will, trust, power of attorney, and medical directive. These tools give a client peace of mind that their legacy is secure and their loved ones will be cared for after they are gone, leaving no chance of lingering uncertainty.

Lessons in Estate Planning from Rain Man

Rain Man is one of the most iconic American movies of the 1980s. Starring Tom Cruise and Dustin Hoffman, it won four Academy Awards, two Golden Globe Awards, and was the highest-grossing film of 1988. Although secondary to the main plot, several estate planning threads run through Rain Man, including those related to trusts, beneficiaries, and how to plan for children who have very different personalities and needs.

Two Brothers and an Inheritance

Charlie Babbitt (Cruise), the estranged son of a millionaire, is dismayed to learn that his late father, Sanford Babbitt, left him only a ’49 Buick Roadmaster and some rose bushes. The rest of his father’s \$3 million estate was put in a trust for the benefit of a mystery person. That person turns out to be Raymond Babbitt (Hoffman), Charlie’s long-lost, autistic-savant brother who is institutionalized at a facility for people with developmental disabilities. The trustee of the trust, Dr. Bruner, is the director of the facility and Raymond’s doctor. Charlie tries to convince Dr. Bruner that he is entitled to half the money in the trust. When that strategy fails, Charlie takes Raymond out of the facility without permission in an effort to use him as a bargaining chip. On a weeklong road trip from Cincinnati to Charlie’s home in Los Angeles, Charlie bonds with his quirky brother and has a change of heart. Upon arriving in Los Angeles, Charlie finds that he is more interested in caring for Raymond than getting the money and gives up his fight for the inheritance.

Using an Estate Plan to Bring Family Together

Careful estate planning can not only help stave off family conflicts but also strengthen familial bonds. Whether a child has a disability or a track record of worrisome behavior, or the parents simply want to instill their values in their children, a trust can have provisions that guide beneficiaries toward a specific desired outcome or deter bad behaviors. Instead of cutting Charlie out of the trust, for example, Sanford could have structured the trust to benefit both of his sons and demanded that Charlie only receive distributions if he helped to care for Raymond. Becoming active in Raymond’s life could have incentivized Charlie to take a more mature course of action while bringing the brothers together. Rain Man has a happy ending, with Charlie returning Raymond to Dr. Bruner and promising to visit him. But happy endings are not nearly as common in life as they are in Hollywood, and this happy ending was mostly accidental. Imagine the drama that may have been avoided if Sanford had stated that Charlie could benefit from the trust if he just spent time with his brother, got to know him, and looked after him.

Write Your Legacy Script with Help from an Estate Planning Attorney

Bringing a successful estate plan to fruition, like making a successful movie, requires a collective effort. If you are the author of your legacy script and the star of your life’s movie, then think of us as the director, working behind the scenes to interpret the script and maintain the creative vision throughout the process, from preproduction meetings to the final edit. To create or update your estate plan, please get in touch with us to schedule a meeting.

Ingredients

For the Filling:

- ☐ 6 medium apples, (honey crisp or gala) peeled and sliced 1/4-inch thick
- ☐ 1.5 ounces raisins, small box
- ☐ 3/4 teaspoon ground cinnamon
- ☐ 1 teaspoon fresh lemon juice
- ☐ 1 tablespoon cornstarch
- ☐ 1/4 cup honey.

For the Topping:

- ☐ 1 cup quick oats, check labels for gluten-free
- ☐ 3 tablespoons light brown sugar, not packed
- ☐ 1 teaspoon cinnamon
- ☐ 2 1/2 tablespoons butter, melted

Directions

- Heat oven to 350F degrees.
- Combine apples, raisins, cinnamon, honey and lemon juice in large bowl.
- Sprinkle with cornstarch. Toss until fruit is coated.
- Place fruit in an ungreased baking dish. Cover with foil and bake 15 minutes. Remove from the oven.
- Mix the remaining topping ingredients. Sprinkle over fruit.
- Bake about 60 minutes or until topping is golden brown and fruit is tender.

RECIPE:
CINNAMON
APPLE CRISP

