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National Academy of  
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Editor  
Sandra L. Smith,  
Certified Elder Law Attorney

## LEGACY LETTERS AND ETHICAL WILLS

A recent *Investment News* article by Kathleen M. Rehl discussed the value of parents leaving “legacy letters” for their children and grandchildren to share after the parents are gone. Traditional estate planning is important for everyone, but many people want to focus on more than just property or financial assets. A legacy letter or ethical will is a good addition to an estate plan.

The author described the letter her mother had written shortly before her death. “Please know how important you are to me and how much I love you. Life has been such a fascinating and interesting adventure with you, my family, being a big part of this journey.” She wrote about her values, lessons life taught her, and her love for each member of the family. Ms. Rehl says that “[w]hat she experienced during her 84 years of life was much more valuable than the material stuff she left behind.”

Barry K Baines is the author of “*Ethical Wills: Putting Your Values On Paper*,” and his website is [www.ethicalwill.com](http://www.ethicalwill.com). The website includes samples of ethical wills, written by people at various stages of their lives. These transition times may include marriage, the birth of a child or grandchild, change of career, retirement, death of a spouse, health challenges or the end of life. People may find that writing these legacy letters can help manage these transition stages better.

Ms. Rehl says that writing a legacy letter not only helps loved ones by communicating the meaning of the author’s life, but is a gift for the writer. “In reflecting upon the past and recording thoughts on paper, writers learn about themselves, ponder what they stand for and have the opportunity to articulate that which is closest to their hearts.” People can write their initial letter and keep it updated each year.

Attorneys who may want to add legacy letters or ethical wills to their estate planning practice may want to write his or her own letter first. This can help them understand the process and provide some guidance to the clients.

The attorneys at Oast & Hook can assist clients with their estate, financial, insurance, long-term care, special needs and veterans' benefits planning.

### Ask Allie

O&H: Allie, summertime is almost here. Do you have tips for families traveling with pets?

Allie: Sure! The latest issue of AAA *Going Places* magazine has some great tips. First, make sure that your pets have current vaccinations, health certificates, and identification tags, and that you have a full supply of medications. (Uh-oh, is that why I'm going to the vet in advance of the move to the new office???) Next, purchase or prepare a pet first aid kit with emergency phone numbers, anti-diarrhea and digestive remedies, and minor wound care supplies. Then, take care of grooming issues such as bathing (dogs yes, cats if you dare), brushing and trimming nails and claws, in case facilities are not available at your destination. To help ease digestion, try to feed your pet its largest meal in the evening or upon reaching the destination. This can help ease digestive discomfort or motion sickness. If your pet eats wet food and will not be doing so on the trip, then you should acclimate your pet to dry food a few days before departure. When underway, ease a pet's anxiety by minimizing disturbances or providing reassurance throughout the journey. If you decide that your pet will remain at home, then consider having a professional pet-sitter stay in your home or visit while you are away. Familiarity breeds happiness for your pet. I'll have some more tips in an upcoming issue of the *Oast & Hook News*...time to finish packing my stuff for the move...after a quick nap.



Please feel free to e-mail your pet- and animal-related questions to Allie at: [allie@oasthook.com](mailto:allie@oasthook.com).

### Announcements

Oast & Hook has moved its Portsmouth office to the TowneBank Building in downtown Portsmouth. Oast & Hook's new address is:

TowneBank Building  
200 High Street, Suite 402  
Portsmouth, Virginia 23704-3719

You may obtain directions to our new office on our website: [www.oasthook.com](http://www.oasthook.com). The phone number and fax number will remain the same.

Oast & Hook attorney Sandra Smith will participate in a panel discussion entitled “Senior Services 101” at Kings Grant House, 440 North Lynnhaven Road, Virginia Beach, Virginia, at 9:30 a.m., Saturday, June 13th. The panel will consist of speakers from Oast & Hook, ElderLife Financial Services, Senior Services of Southeastern Virginia, Solutions Home Care, Tidewater Mortgage Services, and the Alzheimer's Association. This presentation is free and open to the public. For more information or to register, please phone 757-431-8825.

### **Distribution of This Newsletter**

Oast & Hook encourages you to share this newsletter with anyone who is interested in issues pertaining to the elderly, the disabled and their advocates. The information in this newsletter may be copied and distributed, without charge and without permission, but with appropriate citation to Oast & Hook, P.C. If you are interested in a free subscription to the *Oast & Hook News*, then please e-mail us at [mail@oasthook.com](mailto:mail@oasthook.com), telephone us at 757-399-7506, or fax us at 757-397-1267.

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