

CLARIE CONNECTIONS

CLARIE LAW OFFICES, P.A.

A FAMILY OF LAWYERS -- WILLS TRUSTS & ESTATES

Fall 2024

LIFE MILESTONES and CONNECTIONS



Graduation Luncheon

Pictured is Clarie Family with D'Arcy, Peggy and extended family gathered to celebrate a college graduation. Celebrate the Milestones – Update your Estate Plan

My daughter plays a challenging game on-line called Connections. In the game, she is presented a table listing of unrelated words and them must match four into a category. For me, common events I see as an estate planner with my clients are Graduations, Weddings, Births and Deaths. In fact, if I was asked to match these into a category for Connections, the category would be MILESTONES. This category is vital in estate planning for each milestone in your life impacts the needs of your estate planning. Milestone changes in your life serve as the guidepost or reminder in your life to review your estate planning. For some, the milestones will be few but for others, life's journey may have more.

The key in a development of successful estate plan is to recognize the milestones in your life. Many clients wonder how often to review their estate plan: annually, quarterly or every ten years? For me, the best review plan starts with Milestones in your life.

Thoughts to consider: Are your named decision makers ready to help if called upon? Have your children reached enough maturity to handle the responsibilities which come with wealth legacy? Have you sold your family home or maybe bought a second home? Have you planned for the transition of your children into adulthood or the birth of your child or grandchild?

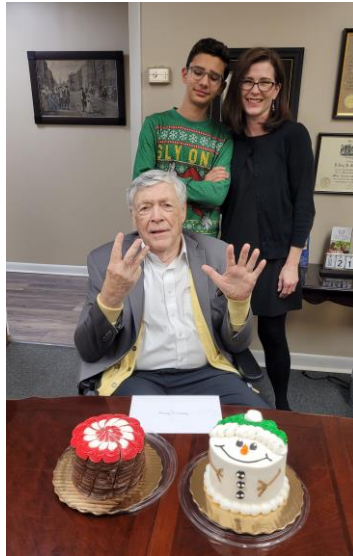
SUPERPOWER OF LEARNING A NEW SKILL

In 2024, I decided to learn to play PADEL. This is not a well known sport and it is not pickleball, at all. PADEL has over 23 million players worldwide in over 90 countries. The racquet game is played on an artificial turf court which is a little smaller than a tennis court enclosed with walls and you play in teams of two. It much like a cross between racquet ball and tennis and players can strike the ball anywhere from their side of the court to return to the other side, including hitting off the wall or even out of bounce. The team that fails to return the ball, loses the point.

I wish I could tell you that I am a champion PADEL player, but still just a beginner. I have been hit with the ball, slipped on the court and often times need long water breaks. So why do I play, because when we try to learn new things, our brain thrives. Studies show that learning a new skill can allow us to form new brain pathways, improve fitness and make social connections. In fact, while not easy to learn a new skill, the benefits can often transform your life. Learning new things is a **SUPERPOWER**.



Padel Court at Sarah Vande Berg Tennis Center Zephyrhills, Florida. Check out our calendar of event at Clarie Law Offices, to see what events are in our community to try a new skill.



Birthday Cake Joy

Happy 80th Birthday to our Founding Father of Clarie Law Offices, P.A., D'Arcy R. Clarie, Esquire. 50+ year attorney who still holds an active practice with Clarie Law Offices, P.A., blessed father, grandfather and a person who makes you want to be a better human. Happy Birthday Dad!!! We love you and honor you!!!

Ingredients

• 1 part selfless love + 1 oz. our pure joy and laughter + 1 oz. dedication to education of women and his son + 5 oz. of pure guts + 50 oz. of pure integrity

Directions

Mix above ingredients with great knowledge and passion
Top with love and courage and your cake will be one that is life lasting with legacy of love !!!!! We love and honor you, Dad.

TIPS TO AVOID SCAMS

Phone scammers or other trickers either on-line or in person are more sophisticated than ever. Be vigilant with these easy tips provided by the Federal Trade Commission to avoid being scammed. Look for the 4 Ps..

1.Scammers PRETEND to be from an organization you know.

Be suspect, verify and know the scammer will pressure you to believe them. Do not be fooled.

2.Scammers say there's a PROBLEM or PRIZE

Before taking any action, pause, wait and verify.

3.Scammers PRESSURE you to act immediately.

As a rule of thumb, Nothing requires immediate action. If you are being told to act immediate, then ask for a time out to verify the need for action is actually present. Disconnect from the scammer.

4.Scammers tell you to PAY in a specific way.

Never pay someone who insist you pay ONLY a certain way. Never give out financial information to a third party without using a website you trust and with verification.

Stop and talk to someone you Trust. Be alert for the 4 Ps.

CLARIE LAW TEAM RESPONSES TO BEST SUPERHERO EVER AND WHY

2 votes for Wonder Woman because she has the invisible jet and cool bracelets

2 votes for Superman because he can fly

Let us know your favorite!!!

CLARIE CONNECTIONS LIFE LONG LEARNING SERIES AT CLARIE LAW OFFICES



Visit our Facebook page!

Join us at CLARIE CONNECTIONS our lifelong learning series held at Clarie Law Offices, P.A.. At our events, we work to connect with others with focus of education, joy, and community. We have formed Clarie Connection to help create a space where people find education, joy and community so they walk in their lives with confidence and hope. See our webpage and Face book page for topic and calendar event.

Become a U.S. Constitution Scholar and Test Your Knowledge

TEST YOUR U.S. CONSTITUTIONAL KNOWLEDGE.

Which are facts are true about the U.S. Constitution?

- A. It is the oldest and shortest written Constitution of any major government in the world
- B. The U.S. Constitution is currently displayed at the National Archives Building in Washington, DC and all four pages are displayed in an environmentally controlled display case.
- C. The reason for the first national Thanksgiving Day on November 26, 1789 was to give “thanks” for the new Constitution.
- D. A, B, and C are true.



Meet Matthew D. Clarie, Esquire

Matthew D. Clarie, Esquire runs our Tampa office branch located on Albany Avenue in South Tampa. Matthew is married and the father of two children. He is a former public defender and experienced litigator. His compassion for his clients paired with his legal skills is well respected and appreciated in our community. He has a love/hate relationship for golf and strong advocate of the benefits of yoga. Matthew provides services for estate planning, probate and trust administration and litigation, DUI and family law.



Matthew D. Clarie, Esquire

TIPS AND LINKS

CLARIE LAW VIDEO BLOG AND YOU TUBE PAGE

Our firm website has information on FAQs and multiple videos on probate topics on the benefits of estate planning and probate administration. In addition, we have our Clarie Law YouTube channel. <https://www.youtube.com/channel/UC3yJi-U9jywME809111Xcqw>



PET FRIENDLY

Clarie Law Offices, P.A. welcomes your pet for an office visit. We ask your pet be in good health and current in vaccinations. Special treat for all pets with parents' permission, of course.

NEED A COPY OF DEATH CERTIFICATE?

Try Florida Dept. of Health, Bureau of Vital Statistics at floridahealth.gov or 1-904-359-6900 and in Pinellas County at 727-824-6900.

Call us or download at Clarie Law Offices website the **FREE Book on Frequently Asked Estate Planning Questions: DANCE OF LIFE**

St. Paul's Catholic Church Grief Support Group Info

St. Paul's Catholic Church located at 1800 12th St. No., St. Petersburg, FL 33704 and at 727-822-3481 offers a grief support group open to all.

DID YOU KNOW? Get helpful information to file through IRS online Account

Taxpayers can create or access their Online Account at irs.gov/account With this account tax payers can access a variety of helpful information including:

- Learn tax rates;
- Get account transcripts;
- Receive notices;
- Get email notifications for information or activity;
- Make or view payments;
- View, create or change payment plans;
- See the amount owed by year.

5 Phases of Grief

The loss of a loved one is life altering. Many people encounter stages of grief and these are (1) Denial (2) Anger (3) Bargaining (4) Depression (5) Acceptance. A counselor or grief support program can be a source of comfort.

Will or Trust?

Many clients ask me do I need a Trust as I want to avoid probate. Remember, many clients can avoid the expense of a Trust by using beneficiary titling so check with us at Clarie Law to find the best fit for your estate planning needs.

Sixth Judicial Circuit Court Web Site

Did you know the Sixth Judicial Circuit Court has a website with helpful tips at <https://www.jud6.org>

At this site, you find many links to access court programs, locations, judges contact information, including links on how to represent yourself and family law forms.

Pinellas County Clerk of the Court and Sixth Judicial Circuit Links

The Pinellas County Clerk of the Court has a premier website which provides resources and links to the Court dockets and many forms to help you. See www.mypinellasclerk.org

The site provides updates on clerk hours, services, rate and has self help forms available for types of cases.

GIVE A GIFT



What is Beneficiary Planning (POD) and Why it Matters

POD planning is naming a beneficiary on your financial accounts so when you die, that person collects your account without any probate need and very quickly after your death. For many this is a good estate planning tool, ask us about it.

Attorney Matthew Clarie's Top 5 List

Back to School Tips For Parents

1. Hydrate and be mentally prepared for first day of school.
2. Take a class in creative lunch packing.
3. Find the coolest school planner, ever and beg your child to use it.
4. Find the backpack of their dreams.
5. Take care of you, drive safe and make sure they are buckled up for school

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Andrea Malyszko
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Ever thought of a
career in the legal
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