BEACH CITIES®
ESTATE LAW

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# A Legacy Beyond Family

## Why More People Are Including Charities in Their Estate Plans

One of the most interesting trends I've noticed recently is that more clients are asking how they can leave a meaningful legacy beyond their immediate family. These conversations aren't limited to high-net-worth individuals. People from all walks of life are exploring ways to support causes they care about while still providing for loved ones.

Many clients tell me they want their estate plan to reflect not only whom they love, but also what they value. Some want to support a church that has been important to them for decades. Others want to help organizations working in education, health care, animal welfare, or community development. In many cases, they're looking for ways to make a positive impact that continues long after they're gone.

As National Nonprofit Day approaches on Aug. 17, it's a fitting time to think about the role charitable giving can play in an estate plan and why more families are making it part of their legacy planning.

### Charitable giving doesn't have to be complicated.

Many people assume charitable planning is only for wealthy families or requires creating a private foundation. In reality, meaningful charitable gifts can be incorporated into estate plans of almost any size.

Some clients choose to leave a percentage of their estate to a favorite charity, and others prefer a specific dollar amount or an "off the top" gift before the remainder passes to family members. Some name a charitable organization as a contingent beneficiary if their primary beneficiaries are no longer living.

### Pass along values, not just assets.

Estate planning is often viewed as a means of transferring assets. Just as important, it can be an opportunity to pass along values. Some families are using a donor-advised fund as a tool to discuss and decide together which causes they want to support over time. Parents and grandparents often find that these conversations help create a legacy that extends beyond financial wealth.

The result is an estate plan that reflects not only what someone owned, but also what mattered most to them.

### Plan opportunities worth exploring.

For some clients, charitable planning can involve more advanced strategies. Certain charitable trusts may allow individuals to contribute appreciated assets while receiving an income stream for themselves, a spouse, or other beneficiaries.

These strategies can be particularly valuable when highly appreciated assets are involved. Since every situation is unique, charitable giving should be coordinated with your overall estate plan to ensure it achieves your intended goals and avoids potential pitfalls.

### Is it time to revisit your plan?

Major life events often prompt people to rethink their charitable goals. Retirement, receiving an inheritance, selling a business,

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# TELL ME SOMETHING GOOD

## A Simple Sign Sparking Powerful Human Connections

These days, our screen time often feels like a loop of doomscrolling and depressing news. But on the sidewalks of New York City, one woman is interrupting that cycle with something simple: a handwritten sign. Hoping to highlight the daily victories of strangers, she is spreading a message of positivity and celebrating the good.

Social media consultant Megan Keaveny spends a lot of time online and knows just how negative the internet can be. She wanted to prove our feeds could instead be a place where we connect, cheer each other on, and find a deeper appreciation for life.



She started by hanging flyers in the city, inviting people to share their good news. When she didn't get much response, she pulled out a marker and poster board and took this positivity project to the streets.

Now, Megan stands on the sidewalk with her "Tell me something good" sign, pressing record as strangers share their good news. Though not everyone rushes over to the mic, she's since collected many happy stories. She explained that many are lighthearted, like starting a new job or a child landing a role in a play, though some can carry a bit more weight.

"My good news is I just got out of rehab, and I'm 42 days clean," one man told her.

Megan's idea to celebrate joy has caught on. Her account @signswithmeg has over 78,000 followers who regularly share their own good news in the comments. It's become a cheer community, with users encouraging each other and finding inspiration in the accomplishments of strangers.

Megan said the project has reaffirmed her belief that we need each other more than we realize, and it's deepened her love and openness for others.

"I think it's beautiful for someone to invite me and a bunch of other strangers into these situations because it's really powerful to find hope together," she said in an interview. She has no plans of stopping now and hopes her videos continue to encourage people to appreciate the "rich inner worlds we all carry around with us each day."

In a world that often feels stuck on repeat in negativity, her simple question is a fantastic reminder that good news is still out there, and sometimes, all it takes is someone willing to ask.

# The Estate, the Heiress, and a Whole Lot of Legal Side-Eye

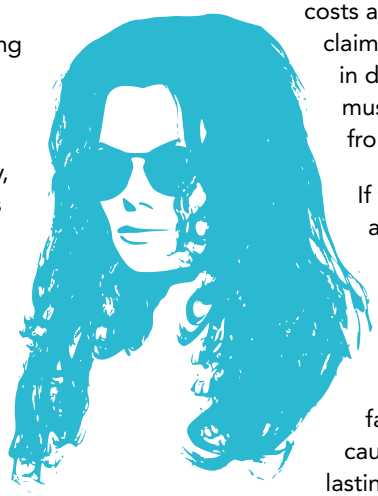
## *WHERE DOES MICHAEL JACKSON'S ESTATE STAND?*

It's been over 17 years since Michael Jackson passed away, yet his estate is still causing heartache for his loved ones. Jackson was one of the most influential, controversial, and globally recognized pop culture figures in history, but when he passed unexpectedly in 2009, his legacy became even more convoluted. Now, his daughter Paris is still entrenched in a battle with executors of Jackson's estate, and it doesn't look like it will end anytime soon.

In early April, Paris Jackson filed a legal document accusing executors John Branca and John McClain of mocking and belittling her. She claims the executors are using money from the estate to pay the media to attack and discredit her. She alleges the executors and their attorney, Jonathan Steinsapir, have referred to themselves in filings as the "grown-ups" and stated that she was "strutting" into a court hearing this past March.

Here is where things get tricky. Paris has also accused the executors of "operating in the dark" and has requested the estate's annual accounting information. In 2021, she also claimed that the executors had pocketed more than $10 million from Jackson's estate. Steinsapir once again went to the media to respond, accusing Paris and her attorneys of making false allegations to distract from the weakness of their case. He also claims that Paris has received $65 million in benefits and could inherit much more.

This battle is clearly not over and could get even messier as time goes on. At the beginning of the year, the executors' attorneys told a judge they were owed over $100,000 in legal costs and attorneys' fees. The executors have also claimed they turned an estate that was $500 million in debt into a "powerhouse and a force in the music business," meaning they won't back down from any fight.



If there's one lesson buried beneath the headlines and family drama, it's that estate planning is about far more than money. The people chosen to manage an estate can shape family relationships, public narratives, and legal battles for years after someone is gone. In Michael Jackson's case, a legacy built on global fame and enormous wealth has also become a cautionary tale about trust, transparency, and the lasting consequences of who is left in control.

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or becoming a grandparent can all inspire conversations about legacy and long-term impact.

For many families, charitable planning isn't primarily about tax savings. It also focuses on supporting causes that have shaped their lives and making a lasting contribution to their community.

If you've been considering charitable giving, this may be an ideal time to review your estate plan. A thoughtful plan can help you provide for the people you love while also supporting the organizations and causes that matter most to you. Give us a call today!

– Angela Klenk



# Refreshing Gazpacho

## Ingredients

- 2 lbs tomatoes, quartered
- 2 Persian cucumbers, peeled and chopped
- 1/2 red bell pepper, chopped
- 1 clove garlic, roughly chopped
- 2 tbsp red wine vinegar
- 1/2 cup water
- 1/3 cup extra-virgin olive oil
- Salt and pepper to taste
- 1 small baguette, quartered
- 6 cherry tomatoes, halved
- 2 tbsp thinly sliced basil

## Directions

1. In a food processor or blender, combine tomatoes, cucumbers, red bell pepper, garlic, vinegar, and water.
2. Blend until smooth, then add olive oil and blend again.
3. Season with salt and pepper to taste, then cover and refrigerate until chilled.
4. Heat olive oil in a large skillet over medium heat.
5. Add baguette pieces, face down, and toast until golden and crisp, about 1–2 minutes.
6. Remove from pan and let cool.
7. Divide soup into even servings and top with basil, olive oil, cucumbers, or tomatoes as desired. Serve with the toasted bread for dipping and enjoy!

# Like Owner, Like Pet

## *Why Your Dog or Cat Is Your Cuddly Clone*

Have you ever felt like your pet was a cuddly copy of you? You're not barking up the wrong tree. Many pet owners feel like their companions, especially dogs, start to act and even look like them over time. The animals in our lives do pick up our quirks, habits, routines, and even expressions, often mirroring the personality traits that make us unique.

### Copycat Companions

Though we might not realize it during the tail-wagging first meeting with a potential pet, humans gravitate toward animals that share similar physical characteristics with them. A study by the DogStudies Research Group in Germany found that people often subconsciously pick pets whose facial features, body type, and colors resemble their own style. For example, researchers noted that people with long hair seem to prefer dogs with long ears. It comes down to our own psychology: Many people feel a sense of comfort with things that are familiar.



### Fetching the Same Vibe

Our pets begin to mirror our temperament and personality through the routines and emotional environment we share. A study in the Journal of Research in Personality found that dogs with social, extroverted owners are more likely to be very friendly. Another study examined stress hormones in the hair of dogs and their owners, discovering that those levels rose and fell together. Like dogs, cats are social creatures, and they learn behaviors as kittens by mimicking their mothers. It's why they often like to sit on our keyboards while we're trying to work or seem fascinated by our favorite objects. They're learning how to behave by watching what we do.

### Sniffing Out Your Feels

Dogs can detect subtle changes in our facial expressions, body language, and even biological cues when we experience different emotions. A study in Current Biology showed that dogs can tell the difference between a happy or angry face and respond accordingly. Cats are also highly attuned to our moods. A study published in PLOS ONE discovered that human parents with neurotic tendencies were more likely to have cats with anxiety, stress, or even medical conditions.

So, if you're wondering whether your terrier is truly your twin or your cat is becoming your clone, you're not just imagining it.

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# NOT YOUR AVERAGE ARSENAL

*WHEN MEDIEVAL WARFARE GOT WEIRD*



Bombs that buzzed, catapulting cows, and a seriously deadly hangover? On medieval battlegrounds, these bizarre tactics were all in a day's work. In olden times, commanders got wildly creative when swords and shields were not enough and used whatever they could to reach a victory. These strange conflicts prove that ancient fighters weren't afraid to think outside the chainmail. Get ready to *siege* the day, with some of the oddest war strategies in history.



## Beeline to Victory

In the 11th century, English commanders made a real buzz with one of their weapons of choice: bees. When the French Duke of Lorraine attacked Henry I's kingdom, his protectors swarmed their enemies by launching active beehives at their horses. The chaos stung so bad that they abandoned the battle. The buzzy bombs were used again when King Richard I transported bees by ship to attack the sultan of Egypt and Syria during the Third Crusade. The unusual ammo caused the city to surrender in just a day.

## Stinky Success

Some ancient combat was a full attack on all the senses. During the Middle Ages, some soldiers hurled the most putrid items they could find at their attackers, like dead animals, fallen fighters, and dung. The odor was so overpowering that it often caused truces and surrenders. It didn't just make whole cities reek. The aim of these putrid projectiles was to spread disease and contaminate the water supply. *"Pee-yew"* has never been so powerful.

## Boozy Battles

Though soldiers often celebrated a win with a toast, alcohol wasn't always just part of the afterparty. In the 10th century, a princess named St. Olga of Kyiv sought revenge for her husband's death by serving up cocktails. She approached the Drevlians, whom they were fighting, to request a funeral feast for her late prince. During the event, she made sure their enemies had copious amounts of mead. When they had drunk themselves into a stupor, she ordered her army to attack, killing thousands of soldiers.

In medieval times, creativity was a weapon, and to be victorious, you couldn't be afraid to try something new. For these fighters, subtlety simply wasn't part of the playbook.