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Talking with loved ones about estate planning and inheritance can be challenging, especially as it centers around two taboo topics — money and death. Although there's no perfect time or place to bring up this emotional topic, some situations may be better than others.

While it may be tempting to open a dialogue during the summer when everyone is home, family get-togethers can be stressful and chaotic. (And why would you want to ruin the mood of your summer BBQ?!)

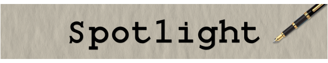
Instead, find a quieter time of year, pick a comfortable environment with positive associations, and schedule a Family Financial Summit. This family meeting, that allows for the sharing of financial values and goals, can be very helpful in aligning expectations about inheritance, financial responsibilities, and the legacy your family wishes to build. Preparation is key for a successful discussion, so draft an agenda in collaboration with your financial advisor & other trusted partners.

Once your Family Financial Summit concludes, the next steps are to organize your legal, financial, healthcare, and personal information & wishes so that your loved ones can easily access this information when it matters most.

With that in mind, this month's Spotlight Section highlights Everplans. This simple online tool allows you to build a complete end-of-life plan, ensuring your loved ones aren't left with uncertainty. As a gift to you, we are very excited to provide this program – free of charge – as a benefit to our clients & their families.

If you need help forming your Family Financial Summit, we're happy to help, as these conversations are a great investment in your family's financial health and harmony. In the meantime, please let our team know if you are interested in receiving an exclusive invitation to the Everplans platform.

- Andy & Jason



Our team has taken the steps to help plan for you and your family's future, but a complete plan is about more than wills, investments and insurance policies. It's about organizing and sharing everything from important information about your home, to your favorite family recipes, to passwords for important online accounts.

For that reason, we're excited to bring you a sophisticated tool we think you'll find useful for "life planning" and managing your family's information. Boone Macaluso Group clients can now get full complimentary premium access to a life and legacy platform with Everplans; a highly secure online tool dedicated to transforming the way people get their families organized.

Everplans is a simple online platform that guides you step-by-step through organizing and safeguarding legal, financial, healthcare, as well as personal information & wishes. The program helps you build a complete and shareable legacy plan, helping give clarity to the people most important to you.

Safely and securely store:

- Important information about your home
- Health and insurance information and directives
- Passwords to online accounts
- Letters to family and friends
- Secret recipes
- Family photos
- And much more

You can assign delegates to any of the sections of your profile so they have access to your information when needed, now or later. Customize which of your loved ones have access to which sections, ensuring your information goes to those who need it most.

Everplans takes careful, consistent precautions to keep your information secure. They regularly audit their environments and code for any security issues, and maintain strict internal procedures that allow their employees and administrators to view a limited set of your data should they help you access your account.

This premium service is being offered exclusively to our clients to help you keep what's most important all in one place, and easily accessible to those you love and trust. For an introduction to Everplans and to better see all that this program can do for you, watch the video below, visit www.everplans.com & then let us know if you'd like to receive a personalized invitation to the platform.

everplans

Watch Video

We all know the importance of discussing your estate plan with your kids, but how do you start that conversation when you're ready to have it? Read on for a guide on how to handle it both effectively and efficiently, so your financial plans are carried out according to your wishes.

Read More

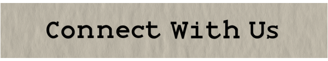
Are your important documents secure and accessible?

Pop quiz: In an emergency, could your loves ones find your current will and power of attorney? If you had to evacuate your home, could you quickly get your hands on your passport, deeds and keepsakes? Are your documents in a watertight, fireproof safe, or scattered around unprotected?

Read More

Mark Your Calendar

May 26: Market Closed for Memorial Day



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