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Myth Busters

Summer Box Office -- Viewer Beware



From Hollywood to Netflix to TV dramas, legal thrillers remain a popular film genre. Recently I enjoyed watching **The Grand Budapest Hotel**, a Wes Craven film. Set in a fictional remote mountain village somewhere near the borders of Germany, Switzerland, and France, it is a quirky film revolving around the owner succession of a grand hotel. There is the requisite scene for a legal drama: "the reading of the will". From the deceased's children to her cousins thrice-removed, all assemble in a dark cavernous room, dressed in black, with an attorney at the center of attention. Here the legal misconceptions leap off the screen:

- Except in limited circumstances, the attorney who drafts a will is not the Executor (or what Wisconsin law calls the Personal Representative) of the will;
- The will in the movie is a massive heap of papers, of which the lawyer verbally summarizes in a sentence. Here in Wisconsin a copy of the will is delivered to the Interested Parties (those named in the will, the deceased's next of kin even if not named in the will, and any named nonprofits). Gathering a cast of characters in a large room where the will is read to them is dramatic but not realistic.
- A third scene shows the person who inherited a valuable painting under the will dictating to his assistant a will, under which the assistant will be the sole heir. In my opinion a will written by the assistant, who is inheriting, is not a wise move.

The movie did contain some accurate points. First, an amendment to a will is called a codicil. Second, the attorney for the estate represents the estate. The attorney does not represent the interests of any interested parties. That would be a conflict of interest.

This was a fun movie. Just do not take screen plays to be legal advice or education. If you have any legal thriller books or films with estate planning or probate issues you would like me to comment on in future newsletters, please send me a message!

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Speaking Events

If your organization is in need of a public speaker, I am available for talks on Estate Planning 101 or Middle Class Philanthropy. Contact me to explore a program suited for your place of worship, favorite nonprofit, or work place wellness program.

Changes at the Henry Vilas Zoo



HENRY VILAS ZOO
CONSERVATION FOR GENERATIONS

In April of this year, Dane County announced it was ending a 103-year-old relationship with the Henry Vilas Zoological Society, which had served as the fundraising arm for the Henry Vilas Zoo. News of the split took many by surprise, and for me it sounded an alarm. Over the years I have had clients specifically name the Henry Vilas Zoological Society in their wills. With severed ties with Dane County, it is imperative that those who have named the Society in an estate plan or as a beneficiary (on an IRA, 401K, life insurance, etc.) to update their designation.

In early June, I spoke with Chuck Hicklin, CFO for Dane County. He stated that for the present moment people should designate "Henry Vilas Zoo" rather than the Society. It will be something you will want to watch, as a new fundraising entity may be created in the future, necessitating another possible update. My office will be monitoring updates about donating to the zoo and will share any future developments in future newsletters.

Upcoming Event of Interest

Leaving Something Better Behind: How you can age with a Social Conscience

American Family DreamBank

Tuesday, August 13th 6 pm - 7:30 pm

Hosted by former Madison Mayor Dave Cieslewicz

The event will explore issues related to health & diet, volunteering, money, long-term care, and "smart" burial options. Although the event is aimed towards Baby Boomers I believe anyone could benefit from this session, and I plan to attend myself. The event is **free**, but tickets are required. Visit dreambank@amfam.com for more details.

American Family DreamBank, a community space dedicated to the pursuit of dreams

Visit

Monday - Thursday: 8 am - 8 pm

Friday: 8 am - 5 pm

Saturday: 9 am - 4 pm

Sunday: Closed

Contact

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Estate Planning - Be Prepared!

Attorney Melinda Gustafson Gervasi, Guest Speaker

September 19, 2019 6:30 - 8 pm

WWBIC- Wisconsin Women's Business Initiative Corporation

Village on Park, 2300 S Park St, Madison, WI

Sign-up at WWBIC - **No Fee**



Get your will and other legal documents in order. Everyone should consider estate planning! You will learn the key considerations of estate planning; wills, power of attorney, living trusts, guardianship and much more.

Does Your Refrigerator Display a File for Life Red Folder ?



Do you have a File of Life, a.k.a. Red Magnetic Folder? If you have never heard of them consider ordering some for your home. As their name implies these are red magnetic folders that affix to your refrigerator and contain your immediately relevant medical information – including your Power of Attorney for Health Care.

Additionally, these folders contain information regarding prior medical conditions, allergies, medications, and emergency contacts. With these File of Life folders, the Paramedics or EMT's know exactly what they need in order to treat you.

File of Life folders are easy to obtain. These folders, and other similar items, are available at retailers such as Amazon for individual purchase. Learn more at <https://www.folife.org>

Special thanks to Erin Idler, one of my clerks, for this research. She's heading to Marquette Law School this fall. Best of Luck, Erin!

Middle Class Philanthropist: How anyone can leave a legacy

In 2013 I released a small book with the intention of sparking inspiration in the average person to leave a charitable gift upon his or her death. You can find the book online at Amazon or Barnes & Noble. Copies of the book are also available at my office for \$5 per copy (includes sales tax). Quantity discounts are available.



What I Learned Over **Coffee**



Late Spring provided me the opportunity to sit down over coffee with Jenni Jeffress, Executive Director of the Madison Public Library Foundation. While my book, **Middle Class Philanthropist: How Anyone Can Leave a Legacy** was the nexus for our conversation, when we finished our conversation I left with several new pieces of information. First, books donated to one of Madison's nine public libraries are first reviewed by the library staff to determine if the book would be a good acquisition for the library's collection. The remaining donated books are given to the library's Friends Group, a fundraising entity. Members of the Friends Group will sell any higher value books on-line, and the rest are put out for public sale. For those practicing **The Gentle Art of Swedish Death Cleanings** (discussed in my 2018 Winter newsletter) who have books to re-home, your local library may a perfect donation spot!

Also, for library users on this mailing list, take note that if you are physically unable to go to your library branch, it is possible to have books delivered. In most instances this does require you to relinquish your library card. For more details contact your local library branch.

A Charitable Life...

Actions speak louder than words, which is why every fall I sign up for a walk to raise funds for a local nonprofit organization. I wrote a book about how anyone can be a philanthropist, and I aim to live by those words daily. For those with some extra funds to direct towards a nonprofit organization, September 14th I will be participating in the Dane County Alzheimer's Walk. Money raised through the event supports the Alzheimer's & Dementia Alliance of Wisconsin, a nonprofit in Madison that supports individuals, families, and professionals impacted by Alzheimer's disease and other dementias through information, education, consultation, and advocacy. It also promotes the advancement of scientific research to better diagnose, treat and ultimately eliminate Alzheimer's disease.



STEP FORWARD GIVE HOPE

Donations can be made on-line at support.alzswisc.org; click on Dane County, and you can find my page under my name, or my team name Agnes' Granddaughter (Agnes was my paternal grandmother who suffered from Alzheimers for a decade, making a profound impact on my childhood) or via check, payable to Dane County Alzheimer's Walk and mailed to my office, Gustafson Gervasi Law Office, LLC, 5555 Odana Rd., Suite 205, Madison, WI 53719. If you are in the mood to walk on September 14th anyone is welcome to join my team.

What I've Been Reading

How to Change Your Mind: What the New Science of Psychedelics Teaches Us About Consciousness, Dying, Addiction, Depression, and Transcendence by Michael Pollan, 2018.

In the past decade, a growing body of research and scientific journal articles have addressed the role of psychedelic drugs in the treatment of depression and anxiety, particularly in palliative care. A 2006 *New York Times Magazine* article, "How Psychedelic Drugs Can Help Patients Face Death," by Lauren Slater, profiles several different stage-4 cancer patients who underwent a single treatment of psilocybin; which is the active chemical in psychedelic mushrooms. April 2018, the National Institute for Health reported on the safety and efficacy of psilocybin, MDMA, and ketamine when administered in a medically supervised and monitored effectiveness. For those looking for in-depth reading on the history of psychedelic drugs, and their emergence in end-of-life care, consider reading Michael Pollan's latest book **How to Change Your Mind: What the New Science of Psychedelics Teaches Us About Consciousness, Dying, Addiction, Depression, and Transcendence**. In characteristic Pollan style, the book is a tome devoted to the people and policies related to "mushrooms". There is an added surprise for fans of the latest *Star Trek Series, Discovery*. The *Star Trek* character of Paul Stamets is more than a Hollywood character, he is inspired by a true-to-life mushroom expert by the same name.

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Navigator Making sense of illness, death and taxes through the eyes of Attorney and Author, Melinda Gustafson Gervasi
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