





## Jump Start Your Decluttering Purge

Are encroaching piles of papers eating away at your peace of mind. Does frustration strike when you open a cabinet or closet, unleashing a wave of clutter that spills out? Like many modern day Americans, people are challenged to keep the clutter at bay. In my day to day work as a probate attorney I can say that the more you work to declutter now, the easier the probate process will be once your earthly days have come to a close. A fun and creative way to tackle the clutter is to play the online 30-Day Minimalism Game, which runs annually in September. I have done this several times in the past and plan to participate again this year. I do modify the rules in an effort to decrease the stress of fitting into their somewhat rigid formula. The end result is always worth the time and effort. Learn more online at <https://www.theminimalists.com/game>. Here is a brief description: Find a friend, family member, or coworker who's willing to minimize their stuff with you next month. Each person gets rid of one thing on the first day of the month, two things on the second, three things on the third, etc.

### Tech Tip

#### Using the Online Court Records To Locate A Will

Given the frequency with which I hear from former clients who have misplaced or lost an original will, I now routinely advise all clients (who reside in Dane County) to file a will for safekeeping with the probate court. Oftentimes a client may not be certain if they completed this task. Thankfully there is an easy way to check using the Wisconsin Circuit Court Records on-line portal. Visit <https://www.wicourts.gov/casesearch>, then click on Circuit Court Records. Accept the terms of use, and you can then enter your LAST NAME , FIRST NAME, and COUNTY of residence. Hit SEARCH. If you filed your will for safekeeping it will appear in the list of records and will have a case number with the letters WL in the middle. For example, 2025WL123. That means it was filed in 2025, for safekeeping (that is what WL represents), and was the 123rd filing of the year. This is also a great tool to use if you are looking for the will of a loved one who has died; there is a chance they also filed a will for safekeeping at the courthouse.

## Understanding the Fine Print

Creating an estate plan is a major accomplishment; only 32 percent of Americans have a will! Using your estate plan, or that of a loved one who has nominated you for a role, is an entirely different matter. It is an area where tiny details matter. Having a strong understanding of the terminology used will help you excel in your role. For example, an Agent of a Power of Attorney for Finance is the person who has legal authority to make financial decisions for a person, normally when that person is alive but too sick to act. In contrast, a Personal Representative (the term used in Wisconsin; other states use Executor) is the person who handles final affairs when a person has died. One is during life, the other only at death.

## What I've Been Reading

A personal goal for my 2025 is to read 50 books this calendar year. In that count I include material I read related to my work as an estate planning and probate attorney. My recent focus has been on the broad topic of aging. Here are three books I've enjoyed this year:



**Let's Talk About Aging Parents: A Real-Life Guide to Solving Problems with 27 Essential Conversations by Laura Tamblyn Watts.** Comprised of 27 chapters, this book addresses a wide and realistic range of issues facing our elders. Subjects touch on home safety to legal documents to addressing drinking problems of the elderly. It is an easy book to read, offering a variety of conversation starters. A full review of the book can be found on my blog, dated February 18, 2025.

### **The Third Act: Reinventing Your Next Chapter by Josh Sapan.**

This book contains approximately 70 profiles of people, from the famous to the unknown, who opted to use their later phase of life to embrace a new role. Many stories included a person who launched a nonprofit or became deeply involved in a cause close to their heart. Other profiles share how the security of their retirement years allowed a person the freedom to go after a dream from their youth, such as launching an acting career. Published in 2022 by Princeton Architectural Press, this book is an inspirational work that illustrates how processing grief can sometimes lead to an entirely new and unexpected role in life.

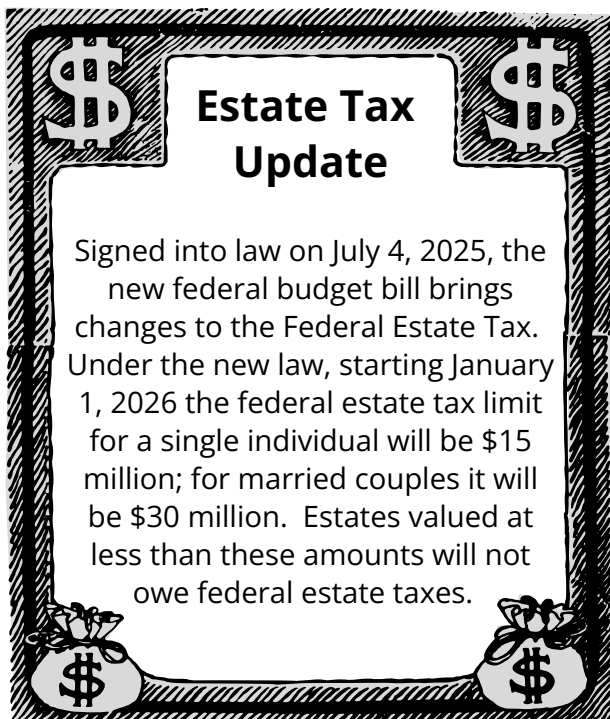
**The Measure of Our Age: Navigating Care, Safety, Money & Meaning Later in Life by M.T. Connolly** explores the fact that while our society has managed to extend the average American life by 30 years, we have lagged on enhancing those years with deeper quality of life. A full review of the book is available on my blog from June 27, 2025.

### **Check Out My Blog**

You can find it at [gustafsonlegal.blogspot.com](http://gustafsonlegal.blogspot.com).  
Receive an email when a new post appears by clicking on Follow in the upper right corner and then enter your email address.

## **Avoid Caregiver Burnout**

According to a 2020 report by the National Alliance for Caregiving and AARP, 1 in 5 people have become an unpaid caregiver to a loved one. National Public Radio's Life Kit series ran a story on February 18, 2025, titled 'Forgive yourself': 4 Pieces of Advice for Caregivers, from caregivers. Help support your mental, physical and emotional health; the piece is 18 minutes long and can be found at <https://www.npr.org/2023/02/16/1157494002/how-caregivers-can-prevent-burnout>



## 4 Items To Keep With Your Estate Planning Documents

Grief will shroud your loved ones who are in charge of your final affairs. The more organized your documents are, the easier the administrative process will be for those acting on your behalf if you are alive but too sick to act or if you have passed away. Here are 4 items that you should keep with your estate plan that you may have overlooked:

1. Copy of your long-term care insurance policy;
2. Terms for royalties owed to you from professional or personal publications;
3. Membership agreement for family farms or cabins that you co-own with other relatives; and
4. a copy of your marital property agreement (if any).

## POA Reminder



As a reminder, my office does not retain signed and dated copies of a client's Power of Attorney for Health Care. In recent months I have received phone calls from hospital social workers seeking copies of documents due to a former client's hospitalization while traveling. The best practice is for all clients to provide copies of the Power of Attorney for Health Care to their named agent(s), primary doctor, and hospital of record. This approach will allow 24x7 access to a power of attorney.

## Alzheimer's Nonprofit Dissolved

It has come to my attention that a local Alzheimer's nonprofit dissolved, and I believe several clients may have named the organization in their estate plan. On June 30, 2023 The Alzheimer's & Dementia Alliance of Wisconsin ceased operations, distributing the funds it had on hand to several other organizations with similar missions. If you have named ADAW in your will, trust or beneficiary forms, it may be wise for you to update the designation to reflect your preferred nonprofit.



Prompted by a request, I have developed a 45-minute educational talk on the basics of estate planning and probate. It's the perfect fit for any workplace's Lunch & Learn program. Help your co-workers stay informed about the law that affects us all; reach out via phone or email if your workplace would like to schedule a session for late 2025 or for 2026.

### Staying Connected



608-274-7192



[melinda@gustafsonlegal.com](mailto:melinda@gustafsonlegal.com)



[gustafsonlegal.blogspot.com](http://gustafsonlegal.blogspot.com)



**Navigator 3758**



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