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—MONTELEON LAW—

## FEBRUARY 2025 NEWSLETTER



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## TOP STORIES



## What is Estate Administration? What You Need to Know

Estate administration refers to the legal process by which a decedent's assets are passed on to their heirs or beneficiaries. Estate administration is a key part of the estate planning process. As for the process of estate administration, it can go smoothly or be quite complicated, depending on the specific estate involved.

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## What is a Charitable Remainder Trust? What You Need to Know

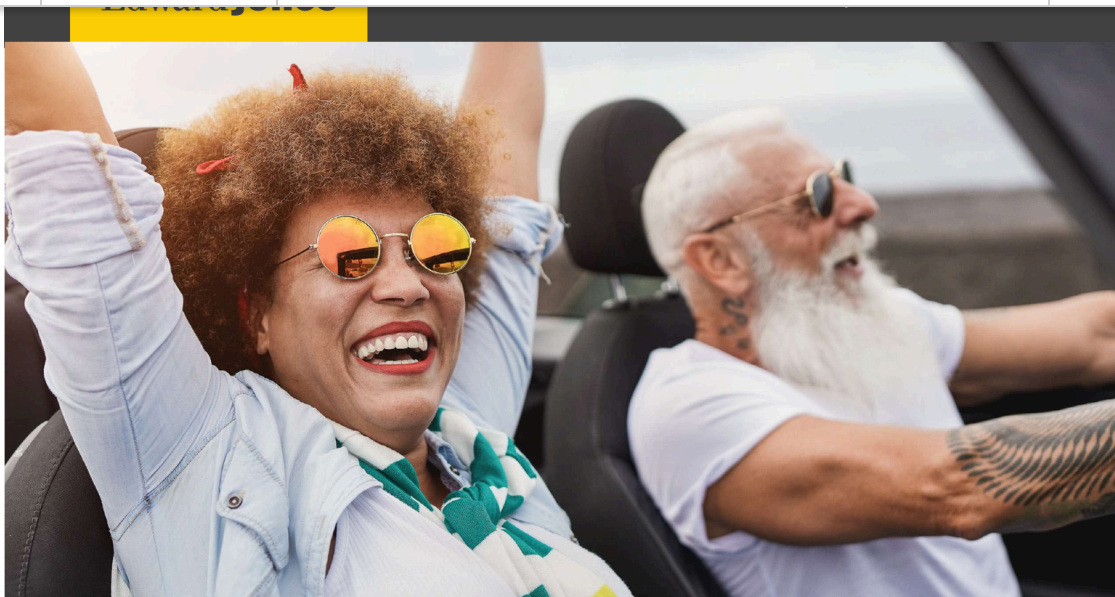
When it comes to trusts, there are many types of both revocable and irrevocable trusts you can have as part of your estate plan. This article will focus on a specific type of trust: a charitable remainder trust, examined in further detail below.

[READ MORE](#)

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## UPCOMING EVENTS

**Edward Jones - Social Security Savy Presentation**



## Social Security and finance

At Edward Jones, we believe financial education is an important part of achieving your goals. We also realize there is more to life than just financial goals. That's why we're excited to invite you to this special presentation.

### Social Security Savvy

AJ Fiore

Divisional Vice President

AIG

To reserve space for yourself and a guest, please email Baishi Wang at [baishi.wang@edwardjones.com](mailto:baishi.wang@edwardjones.com) by 02/28.



**Baishi Wang, CFP®, CFA®**  
Financial Advisor  
160 N State Rd 102  
Briarcliff Manor, NY 10510  
914-488-0360

### You're invited

Thursday, March 6th, 2025  
5:30 pm - 7:30 pm

Hosted by:  
Baishi Wang

105-TEN Bar & Grill  
127 Woodside Ave,  
Briarcliff Manor, NY 10510

Dinner will be served.

PLEASE SEE IMPORTANT DISCLOSURES ON PAGE 2.

MKD-6488N-A-FL EXP 30 JUN 2026 © 2025 EDWARD D. JONES & CO., L.P. ALL RIGHTS RESERVED. AECSPAD 24398419

### Attention all New York clients and friends!

Edward Jones is hosting a special presentation, Social Security Savvy, led by Baishi Wang. Join us to learn strategies for maximizing your Social Security benefits and securing your financial future.

### Social Security Savvy

Thursday, March 6th, 2025 5:30 pm - 7:30 pm

Hosted by: Baishi Wang

Location: 105-TEN Bar & Grill 127 Woodside Ave, Briarcliff Manor, NY 10510

## Parkinson's Support Group Presentation



## PARKINSON'S SUPPORT GROUP

Join our Parkinson's Support Group for a safe space to connect, share, and find support. Together, we navigate the challenges of Parkinson's with compassion and community.



**Tuesday March 11th, 2025**  
**3:00 pm**



Our Speaker

**ALYSSA MARIE MONTELEON, ESQ.**

*Monteleon Law, PLLC*

No matter the reason or size of your estate, having the right plan in place is essential to protect your legacy and ensure your wishes are fulfilled both during your life and after you pass away. Join us for an informative session on estate planning options, the importance of a comprehensive plan, and common mistakes that are easy to avoid. This presentation will be led by Alyssa Monteleon, Esq., a local attorney and member of the National Academy of Elder Law Attorneys. Specializing in Estate Planning and Elder Law, Alyssa is passionate about educating and empowering individuals to take control of their future.



[www.staffordcrossing.org](http://www.staffordcrossing.org)



540-656-2040



1420 Forbes Street, Fredericksburg, VA 22405

If you or someone you know is affected by Parkinson's, please join us at Stafford Crossing Church for a special presentation by Alyssa Monteleon. Alyssa will discuss the importance of estate planning options specifically for individuals in the Parkinson's Community. You will get to learn, connect, and support others.

### **Parkinson's Support Group**

Date: Tuesday, March 11th, 2025 at 3:00 pm

Location: 1420 Forbes Street Fredericksburg, VA 22405

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## **FEBRUARY CELEBRATIONS!**

**Join us in celebrating these holidays this month and share how you observed them on our social media!**



### **February is American Heart Month!**

Every year more than 600,000 Americans die from heart disease. The number one cause of death for most groups, heart disease affects all ages, genders, and ethnicities. Risk factors include high cholesterol, high blood pressure, smoking, diabetes, and excessive alcohol use.

cholesterol and blood pressure. This is a great chance to start some heart-healthy habits!

To read and learn more, visit National Today below!

[LEARN MORE HERE](#)



**February 14th - Valentine's Day**

**Happy Valentine's Day from Monteleon Law! 💕**

We're celebrating love, trust, and the meaningful relationships we've built with all of you. Whether you're spending the day with loved ones or taking time for yourself, we're here to support you every step of the way. Wishing you a day filled with happiness and love!





**February 17th - Presidents' Day**

**Happy Presidents' Day from Monteleon Law!**

We honor the leaders who have shaped our nation and inspired progress. At Monteleon Law, we're committed to guiding you with the same dedication & integrity. Wishing you a reflective and enjoyable Presidents' Day!

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## **SDMNY - Good News**



Supported Decision Making (SDM) is a widely recognized as a less-restrictive alternative to Guardianship. This alternative allows people with intellectual and developmental disabilities to make their own decisions with the support of trusted people in their lives. SDMNY began in 2016 as a pilot project and based on its success, a bill was passed in 2022. To learn more about SDMNY and how they continue to make SDM a reality in New York, please visit: [www.sdmny.org](http://www.sdmny.org).



Joanne Palombo, became a trained Facilitator with the program. This past month, Joanne was recruited as one of eight individuals for the high quality of her work with Decision-Makers and their supporters, her commitment to the human and legal rights of people with disabilities, and her willingness to take on new challenges to become a Mentor with SDMNY.

We are so proud of the work Joanne has done in partnership with SDMNY! To read SDMNY's Good News newsletter highlighting Joanne's accomplishment, along with the other new Mentors, please click the link below.

[READ MORE HERE](#)

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## PREVIOUS POSTS

**Missed out on our past social media posts? Catch up below!**



**Tips for seniors to stay safe in extreme cold conditions:**



**3 significant changes coming to Medicare this year:**

**AARP**



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