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—MONTELEON LAW—

MARCH 2025 NEWSLETTER



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TOP STORIES



Can You Have More than One Executor of Your Will?

Choosing the right person to be the executor of your will is crucial, as it ensures your assets are distributed according to your wishes after you pass. But can you appoint more than one executor? The answer is yes. This article will explore the role of an executor, how to select multiple executors and the pros and cons of doing so.

[READ MORE](#)

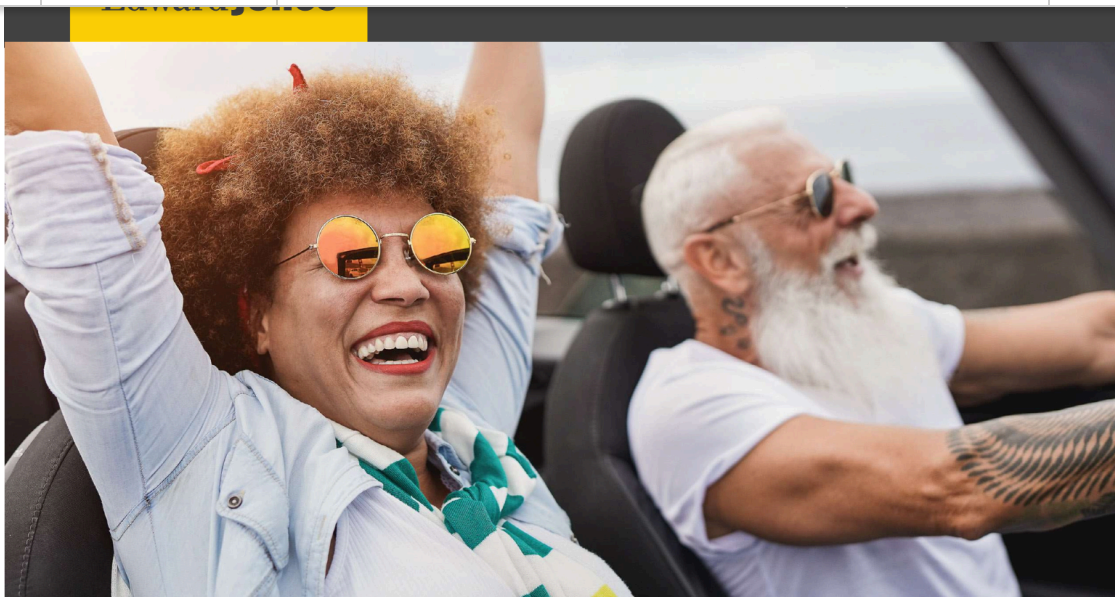
Can You Leave a Retirement Account in Your Will or Trust?

Upon retiring, you may begin to wonder if you can leave your retirement account to a loved one in your will or in a trust. This blog will answer those questions in further detail, as well as other frequently asked questions surrounding your retirement accounts and the relation to your estate plan.

[READ MORE](#)

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 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.

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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



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

MARCH CELEBRATIONS!

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



March is Brain Injury Awareness Month!

Every March, the Brain Injury Association of America (BIAA) leads the nation in observing Brain Injury Awareness Month. This year, there are exciting new developments for the brain injury community, including a new awareness campaign, advocacy initiatives, events, fundraising opportunities, new publications, and more.

[LEARN MORE HERE](#)

March is Color Therapy Month!

Color Therapy Month occurs in March each year, intending to inspire us to use colors to change our world. In the precise words of founder Eleyne-Mari, “Change your Colors...and you change your World!” So how exactly can one go about this? Well, the secret lies in an ancient practice of using color therapy to heal one’s energies. Before you dismiss this as ‘Hippie mumbo-jumbo’, take a second to think about how we all make use of different color choices to impact the way we feel. Whether it be in picking out an outfit or deciding on wall paint; on some level, we subconsciously make a decision based on how the colors affect our mood, feelings, and sensibilities. So perhaps there’s a rationale to this after all! Visit National Today below for more info!

[LEARN MORE HERE](#)



March 9th - Daylight Savings

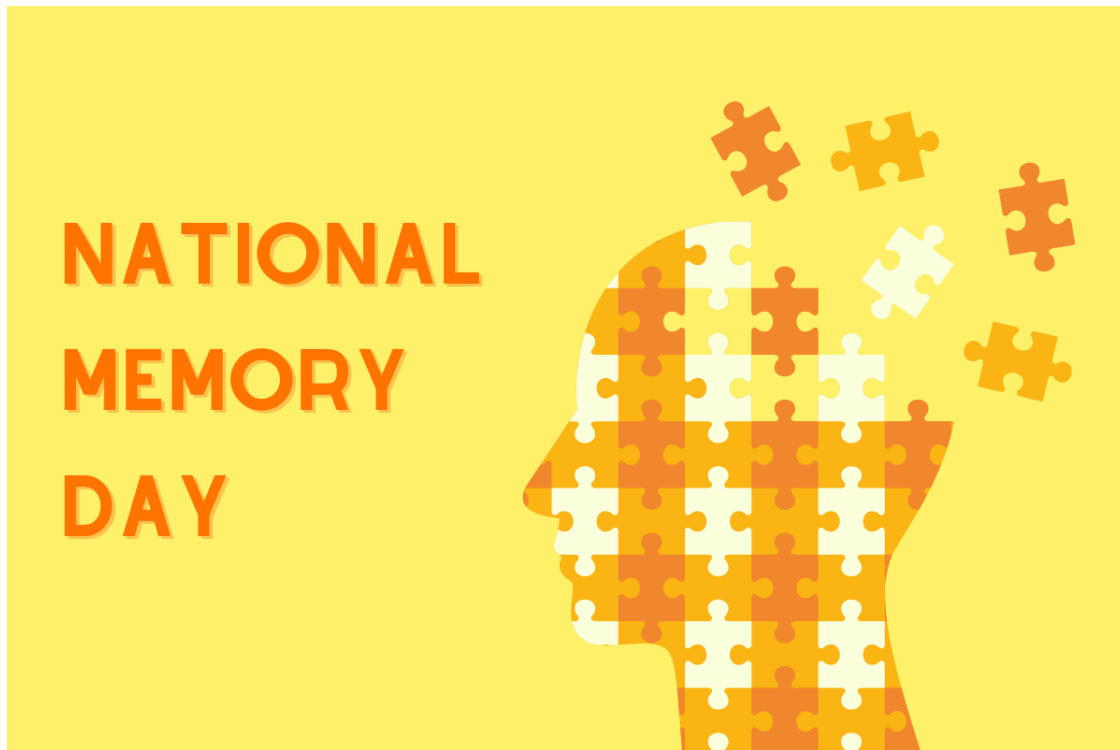
Be sure to change your clocks one hour ahead!



March 17th - Saint Patrick's Day

the green this St. Patrick's Day!

Happy Saint Patrick's Day from Monteleon Law!



March 21st - National Memory Day

Memory Day takes place every year on March 21. The day celebrates the human memory and all that it can achieve. It is also a day to draw attention to the issues caused by memory loss through diseases and conditions like Alzheimer's and Dementia, which affects thousands of people. Additionally, your memory may not be as good as you think. Keeping multiple reminders and lists on your phone and notebooks, and walking into a room feeling like you forgot something are things that we all do.

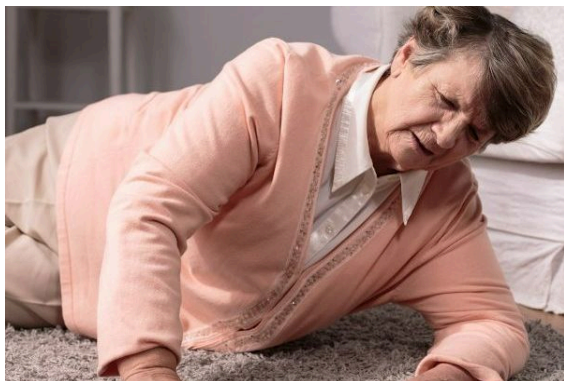
Want to see how well your memory is? Take this memory quiz below!

[MEMORY QUIZ](#)

Check out more information and details about National Memory Day from National Today!

PREVIOUS POSTS

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



Learn about the dangers that clutter in the home can have for seniors:

[LTC News](#)



Learn how caregiver support groups can provide much needed relief to caregivers:

[U.S. News](#)



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assisted living facility:

moving into a senior living facility?

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