



WHITE OWL

FINANCIAL ADVISORS

## QUEST CORNER

Welcome to **Quest Corner**, our newsletter with spotlights on lifestyle information, financial tips, local happenings, and more. We hope you will find this to be a valuable and entertaining resource.

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**Advisor Message**



Estate planning is a critical component of your financial wellness and an essential extension of your comprehensive financial planning. With August being "Make a Will" month, there's no better time to ensure your assets are distributed according to your wishes, protect your loved ones, and minimize potential legal complexities. As highlighted in the below article, estate planning is not just for the wealthy; it's vital for everyone. A well-structured estate plan complements your broader financial strategy, helping manage your affairs during your lifetime and beyond, safeguarding your family from unnecessary stress, and providing clear directives to avoid potential disputes. By integrating estate planning into your overall financial plan, you can achieve peace of mind and protect your legacy.

If you'd like to discuss this further or need suggestions for estate lawyers, please don't hesitate to reach out!

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## **Financial Tips**

### **Yes, You May Need an Estate Plan – Even If You Don't Have a Large Estate**

Do you need an estate plan? The answer to that question is almost certainly yes. No matter the size of your estate, you need to have a plan in place so you can be certain that your wishes - and your family's needs - are met.

The article linked below will explain why you need one, along with giving insight into what an estate plan is, what it includes, and how you can get your plan started.

[Click here to learn more.](#)

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## Lifestyle

### Back-to-School Essentials

It's that time of year already.

If you're a parent, this is something you've probably been waiting for all summer. Your kids, on the other hand, might not be as excited. That's right! It's back to school time!

Before you head out to stock up on school supplies, do your homework. The team over at Better Homes & Gardens sat down to compile a list of their favorite back-to-school finds.

[Click here to read the article.](#)

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## Triangle Happenings

### **Beer, Bourbon & BBQ Festival, Aug. 2-3, 2024**

Beer sipping, bourbon tasting, music listening and barbecue eating at [Cary's Koka Booth Amphitheatre](#)—what's not to love? Get details [here](#).

### **CaribMask Carnival, Aug. 17, 2024**

A festival to promote diversity, and equality and create a deeper appreciation for Afro-Caribbean culture in the Raleigh area, CaribMask is expected to return for an 11th annual event in downtown Raleigh in 2024. In previous years, a parade of bands, flag ceremony, live music, and tons of food and drinks have kept a joyful crowd of more than 15,000 people plenty happy. Learn more at [this location](#).

### **Lazy Daze Arts and Crafts Festival, Aug. 24-25, 2024**

For more than 40 years, the Lazy Daze Arts and Crafts Festival has put local artists and craftsmakers in the spotlight. Today, the [Cary](#) festival has grown to two days, features more than 300 artists from 16 states, and has multiple stages of live music, a beer garden, and plenty of food trucks to keep everyone happy. [VisitRaleigh.com](#) has all the details on this great event.

## **15th Annual African American Cultural Festival of Raleigh and Wake County, Aug. 31-Sept. 1, 2024**

An annual celebration of African American culture expressed through art, music, food, and community, this two-day downtown Raleigh festival showcases local, national, and international artists, performers, food vendors, and area business owners. Learn more [here](#).

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### **Word of the Month**

The Word of the Month is: **Bequeath**

**Imperturbability:**  
**adjective** /impər'tərbəb(ə)l/

**Meaning:** leave (a personal estate or one's body) to a person or other beneficiary by a will.  
pass (something) on or leave (something) to someone else.

**Sentence:** "In her will, she decided to bequeath her grandmother's antique necklace to her niece."

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Thanks for reading. Would love to hear your thoughts!

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