



## Andrea L. Jakob, PA

*Legal knowledge, human wisdom:  
Helping you plan today, so you can  
sleep better tonight.*

### Holiday Fun Facts (That Double as Estate Planning Conversation Starters)

Picture this: the house is decorated, the food is in the oven, and the family is finally under one roof. It's the perfect time for... an argument about who gets Grandma's china.

Let's avoid that.

Here are some light, holiday-themed facts you can sprinkle into conversation — each with a simple estate planning question attached. You don't have to turn your gathering into a legal seminar. Just use these as gentle conversation starters and food for thought.

---

#### Season of Giving

- **Holiday Fact:**  
Americans plan to spend hundreds of dollars each year on gifts, food, and decorations.
- **Estate Planning Fact:**  
About two-thirds of Americans do **not** have a will, yet everyone leaves a legacy — financial or otherwise.
- **Thought to Unwrap:**  
If you could leave just one meaningful “gift” to your loved ones — money, a story, a tradition, a value — what would it be?

---

#### Treasures of Time

- **Holiday Fact:**  
Almost everyone decorates the inside of their home for the holidays — from lights to special dishes to keepsake ornaments.
- **Estate Planning Fact:**  
Your will can spell out exactly who should receive sentimental items like holiday china, ornaments, menorahs, or other family treasures.
- **Thought to Unwrap:**  
Are there specific items you'd like to see in particular hands one day — and is that written down anywhere?

---

## Peace on Earth

- **Holiday Fact:**  
Around 40% of families say they have disagreements during holiday gatherings. Some of those arguments are serious enough that people later change their wills or plans because of them.
- **Estate Planning Fact:**  
A clear estate plan can prevent a lot of hurt feelings and uncertainty when emotions are already running high.
- **Thought to Unwrap:**  
Has your family had any past disagreements that might influence how you want to set up your plan?

---

## Shorter Days

- **Holiday Fact:**  
The winter solstice marks the shortest day of the year, but the earliest sunset actually happens a bit earlier in December.
- **Estate Planning Fact:**  
A properly designed trust can shorten or even avoid the probate process, saving time when your family needs it most.
- **Thought to Unwrap:**  
When you think about your own affairs being settled, what matters most — speed, privacy, simplicity, or keeping things out of court?

---

## Fur-Ever Gifts

- **Holiday Fact:**  
Many Americans budget for holiday gifts for their pets — sometimes a lot!
  - **Estate Planning Fact:**  
Your estate plan can include instructions and funds for your pets' care. Some people even leave money in trust specifically for their animals.
  - **Thought to Unwrap:**  
If something unexpected happened tomorrow, who would care for your pets, and how would you want them supported?
-

## Will Power Season

- **Holiday Fact:**  
The U.S. Postal Service is required by law to deliver mail to every address in the country, even the most remote. Private carriers can choose where they go — USPS cannot.
  - **Estate Planning Fact:**  
If you don't leave your own instructions through a will or trust, Florida's default laws decide who inherits from you and in what amounts.
  - **Thought to Unwrap:**  
Are you comfortable letting state law "deliver" your estate to people based on a one-size-fits-all formula?
- 

## Little Lights, Bright Futures

- **Holiday Fact:**  
Parents often spend a significant amount per child on holiday presents.
  - **Estate Planning Fact:**  
Most parents of minor children still haven't done the most important "gift" planning of all: choosing guardians and documenting their wishes.
  - **Thought to Unwrap:**  
If you couldn't be there, whom would you trust to raise your children — and do they know that?
- 

## Wills for All Seasons

- **Holiday Fact:**  
Younger adults (Millennials and Gen Z) are spending more on "self-gifting" than any other age group.
  - **Estate Planning Fact:**  
Adults under 35 are now more likely to have some form of estate plan than those in the 35–54 age range.
  - **Thought to Unwrap:**  
How does your stage of life — whether you're just starting out, raising kids, or nearing retirement — shape the kind of legacy you want to build?
-

## Making a List

- **Holiday Fact:**  
Nearly half of shoppers say they do most of their holiday shopping in December. A good number wait until the last minute.
- **Estate Planning Fact:**  
One of the top reasons people give for not having a will is simple: procrastination.
- **Thought to Unwrap:**  
What is **one** estate planning task you've been putting off — and could you reasonably commit to tackling it in the next 30 days?

---

## Tidings of Charity

- **Holiday Fact:**  
About 30% of annual charitable giving happens in December.
- **Estate Planning Fact:**  
Your estate plan can include gifts to charities that have meant a lot to you or your family, creating a legacy of generosity in your name.
- **Thought to Unwrap:**  
Are there causes, schools, places of worship, or organizations you'd like to support long after the holidays are over?

---

## Wishing You Good Tidings (and a Solid Plan)

You don't have to bring up wills and trusts over turkey — but a relaxed conversation about wishes, values, and “what ifs” can go a long way toward making future decisions easier. If any of these thoughts sparked a question (or a little bit of worry), let's talk. One honest conversation now can save your family from confusion and conflict later — and that may be the best gift you give them this year.