JULY 2026

Piece Of Mind

In order for you to have peace of mind, we are giving you our piece of mind.

PRESTON ESTATE PLANNING
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The Older I Get, the More I Understand 'The Winner'

When I was a kid, my dad used to play "The Winner" by Bobby Bare in the car, and I loved it.

The song opens with a young man who is hell-bent on glory spotting an older cowboy in a bar. The cowboy is broad-shouldered and battle-worn, with scars, a broken nose, missing teeth, and a cloudy eye. But instead of feeling sorry for him, the young man is impressed. He sees toughness. Reputation. Legend. The kind of winner the young man longs to be.

So, naturally, he challenges the cowboy to a fight, and that's what makes the song brilliant.

The old cowboy responds by telling story after story about brutal bar fights and duels from his past. In one verse, he even brags about stealing away another man's woman, one who gets meaner and uglier every day, "but I got 'er, boy, and that's what makes me *the winner.*" In fact, every story ends with the cowboy declaring himself the winner, regardless of what it cost him along the way.

As a kid, I thought the song was hilarious because the stories are so over-the-top ridiculous. If you've never heard it, I encourage you to listen to it and try not to crack a smile. But as an adult, I think the genius of the song is that you slowly realize the younger man, and maybe the listener, too, completely misunderstood what he was looking at.

The cowboy "won" every fight, but he still feels like the cautionary tale.

That idea stuck with me. When we're young, winning often feels simple. You beat the other person, come out on top, prove yourself, and get the last word.

But life eventually teaches you that there are all kinds of victories that don't actually feel very victorious afterward.

You can win the lawsuit and lose your peace.

Win the argument and lose the relationship.

Win financially while damaging your family in the process.

"But life eventually teaches you that there are all kinds of victories that don't actually feel very victorious afterward."

In estate planning, I sometimes see families become so focused on fairness, control, or being "right" that they lose sight of what they actually value most. The conflict becomes the point. The victory becomes symbolic.

And sometimes, years later, nobody feels like they won at all.

The older I get, the more I think real success looks quieter than I used to imagine. It looks like protecting relationships. Preserving dignity. Making difficult things easier for the people you love. Leaving behind clarity instead of chaos.

Funny enough, an old country song I laughed at in the backseat as a kid may have taught me that before I was mature enough to understand it.

–Jennifer Knight

The Myth of 'Everything Automatically Goes to My Spouse'

One of the most common phrases we hear in estate planning is, "We're married, so everything just automatically goes to my spouse anyway."

Sometimes, people say it confidently. Sometimes, hopefully. Sometimes, it's the reason they've postponed planning for years.

And while there *is* some truth buried in that idea, it is also one of the biggest misconceptions in estate planning. Because the reality is that marriage alone does not magically organize your legal and financial life. In fact, some of the most stressful situations families experience happen precisely because they assumed "everything would justwork itself out."

The First Surprise: Not everything is controlled the same way.

Many people think a Will or Trust controls all of their assets. It doesn't.

Some assets pass by beneficiary designation. Some pass by title. Some pass by Trust. Some may require probate. And some can create unintended consequences entirely.

For example:

- Retirement accounts usually pass to the named beneficiary on file.
- Life insurance passes according to the beneficiary designation, even if your Trust or Will says otherwise.
- Jointly owned property may pass automatically to the surviving joint owner.
- Assets in one spouse's sole name may still require court involvement, depending on how they are titled and whether planning was done.

That's why estate planning is often less about answering, "Whom do you want things to go to?" and more about, "How are these assets actually going to transfer in the real world?"

The Second Surprise: Incapacity creates problems.

Many couples assume that if one spouse becomes ill or incapacitated, the other spouse can simply step in and handle everything. Unfortunately, that is not always true.

Without properly prepared legal documents:

- Financial institutions may refuse access.
- Medical providers may limit communication.
- Families can end up in court pursuing conservatorship proceedings.

Marriage helps in many situations, but it is not a substitute for comprehensive planning.

The Third Surprise: Good intentions are not a legal plan.

We often meet families who truly believed things were "simple."

Maybe they verbally discussed their wishes. Maybe they assumed their spouse or children would naturally know what to do. Maybe they assumed everything was jointly owned.

But estate administration often reveals gaps people never realized existed:

- Outdated beneficiary designations
- Accounts left outside the Trust
- Unclear distribution instructions
- Missing incapacity documents
- Assets titled in ways that create unnecessary complications

By contrast, families who have completed and properly funded estate plans often experience a different reality. Our Life Plan clients have the comfort of knowing their plan was designed to work together as a coordinated system, not just a stack of documents in a binder.

Whether you are married or single, your Trust contains clear instructions regarding how assets should be handled and distributed. Married Life Plan clients even have remarriage protection in their documents, which ensures your named Trust beneficiaries receive your Trust assets even if the surviving spouse remarries after the death of the first spouse.

Our clients have comprehensive, non-springing Financial Durable Powers of Attorney in place so trusted individuals can step in immediately if needed, without unnecessary delays or additional hurdles during a crisis. You also have an Emergency Medical Information Card that provides quick access to critical health care information and directives in the event of an unexpected emergency. (Here's your friendly reminder to make sure that card is still located in your wallet. If you can't find your card, please contact us.)

Just as importantly, you have access to guidance throughout the funding process to help ensure accounts are properly titled and beneficiary designations are coordinated with the overall estate plan. This is where the Preston Estate Planning Funding Department comes in. They provide you with a comprehensive Asset Detail Report that covers all your assets, not just your Trust assets, to ensure coordination.

That coordination matters more than many people realize.

A beautifully drafted Trust can still fail to accomplish its goals if assets were never properly connected to it. Beneficiary designations filled out years ago can unintentionally override carefully considered estate planning decisions. And during moments of crisis, even small organizational gaps can create enormous stress for loved ones.

The families who navigate these situations most smoothly are rarely the ones who "had documents somewhere." They are the ones who made sure their plan was complete, coordinated, and actually functional in the real world.

Estate planning is about clarity.

At its core, estate planning is not really about documents.

It is about reducing uncertainty during some of the hardest moments a family will ever face.

Clear planning can help:

- Avoid probate.
- Reduce conflict.
- Protect children.
- Streamline decision-making.
- Ensure assets transfer according to your wishes rather than default legal rules.

The good news is that many of these issues are entirely preventable with thoughtful planning and regular updates. Because "everything will automatically work out" is not really a strategy. The Life Plan is.

WHEN GOOD ENOUGH IS BETTER

THE MYTH OF PERFECT PARENTING

Most parents have found themselves in a situation with their kids where they stop and think, "I'm messing this up."

It usually happens in the middle of an ordinary day. You get short with your child when you meant to be patient, or you realize too late that they were trying to tell you something while you were only half listening. Maybe you were distracted or tired, maybe your mind was already on the next thing.

In those moments, it can feel like good parenting depends on getting everything right all the time. It doesn't. Kids tend to benefit much more from a parent who is emotionally available and engaged than from one who is so concerned with getting everything right that they neglect the relationship itself. That lines up with the older idea of "good enough parenting," a research-backed approach that dates back to the 1950s.

Being a "good enough" parent isn't about lowering the bar you're working toward. The point is to recognize that kids can thrive with parents who are responsive and involved, even though they are also imperfect, distracted, and human.

Research shows that this approach is actually more beneficial for our kids than over-parenting, which can leave them more anxious and less confident. It also helps to remember that when parents make too much of their own mistakes, kids can start absorbing that same kind of pressure and self-criticism.

So, what does this type of parenting look like in real life? It basically comes down to staying connected with our kids without acting like every moment has to be handled perfectly. Often, that can be as simple as pausing before reacting or stopping to give kids our full attention when they're trying to tell us something. It might also mean going back to a moment we handled poorly and trying again. Responses like those can do more to build resilience and trust than parents sometimes realize.

No matter how much effort we put in, parenting will always be challenging. The goal isn't to get it perfect, but to keep showing up, learning, and growing, while letting go of the idea that every imperfect moment means we're doing something wrong.

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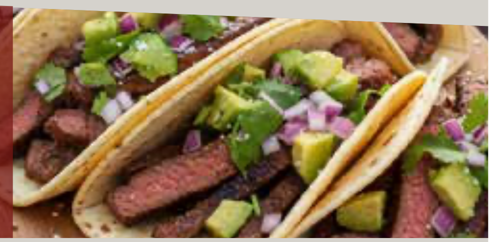
TAKE A BREAK!

FLANK STEAK TACOS



Ingredients

- 1 tsp paprika
- 1/2 tsp ground cumin
- 1/2 tsp garlic powder
- 1/2 tsp chili powder
- 1/2 tsp dried oregano
- 1/4 tsp onion powder
- 1/2 tsp ground black pepper
- 1 tsp sea salt, divided
- 1 lb flank steak
- 2 tbsp olive oil, divided
- 1 small red onion, finely diced
- 1/3 cup cilantro
- 1 ripe avocado, diced
- 1 tbsp lime juice
- 8 small flour tortillas

Directions

1. Heat grill to medium heat.
2. In a small bowl, combine first 7 seasoning ingredients with 1/2 tsp sea salt.
3. Brush steak with 1 tbsp olive oil and sprinkle seasoning mixture on both sides.
4. Grill steak for 2–4 minutes per side.
5. Remove steak from grill and let it rest.
6. In a bowl, stir together 1/2 tsp sea salt, 1 tbsp olive oil, onion, cilantro, avocado, and lime juice.
7. Heat flour tortillas on the grill.
8. Slice the grilled flank steak into 1/4-inch strips. Assemble your tacos with the onion avocado mixture and enjoy!

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Inside

Sun, Sand, and a Side of Celebs

A HAMPTONS ESCAPE AWAITS

If you're looking for sun, sand, and a place where weekends seem to last a little longer, one of the country's most iconic seaside resorts is calling. The Hamptons are known for their pristine beaches, high-end dining, and superb social scene. A beloved retreat for New Yorkers and celebrities, this series of villages makes for a vacation that feels like something out of a movie. Whether you want to eat at a popular restaurant, take a stroll along the shore, or rub shoulders with movie stars, the Hamptons make for an unforgettable getaway.

Breathtaking Beaches

The Hamptons are famous for their sandy beaches, with many options throughout the area's different towns. Coopers Beach in Southampton is known as one of the best in America, featuring white quartz sand and a backdrop of impressive dunes and mansions. If you're looking for a quieter place to catch some sun, Cryder Beach (also in Southampton) is less crowded and a perfect place to watch surfers. Main Beach in East Hampton is one of the most popular in town, beloved for its beautiful views.

Terrific Towns

The Hamptons comprise two townships, each with quaint and lively villages. Each offers a different setting for shopping, dining, and sightseeing. Southampton has a beautiful main street, popular beaches, and restaurants where you can spot a movie star. East Hampton and Bridgehampton are charming and known to be a little less fast-paced. Local eateries like Bobby Van's Steakhouse and Topping Rose House make Bridgehampton a favorite destination for fine dining.

Affordable Activities

While the Hamptons come with an elite price tag, you can find plenty of budget-friendly activities to enjoy. A scenic drive along the Montauk Highway is filled with iconic Americana houses and seaside sights. One of the best ways to explore the many villages is to rent a bike for the day or stroll in town so you can stop in the little shops and farmers markets. Montauk is a popular, scenic hamlet located at the easternmost point of Long Island. You can find affordable accommodations and food options in this laid-back tourist destination.

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