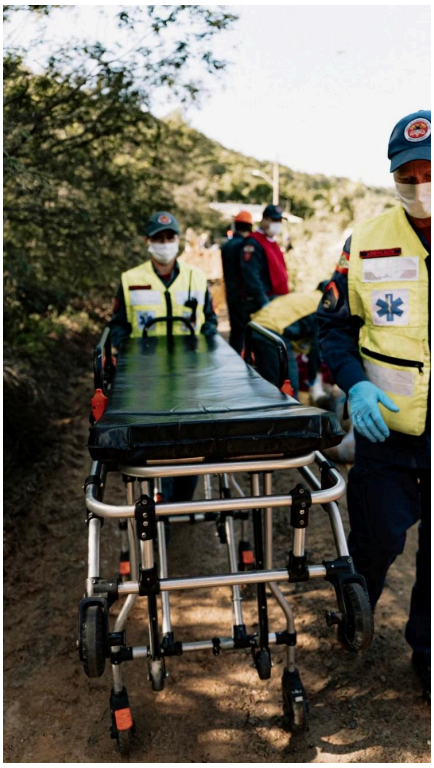
SOWARDS LAW FIRM

August Newsletter



What Happens If Something Goes Wrong While Traveling?

You may be prepared for the ordinary inconveniences of travel without considering the more serious possibilities. It is easy to imagine a missed connection or a lost bag and how you would deal with these common traveler snafus. But a serious injury, financial scam, or emergency that leaves you unavailable and unreachable, however briefly, is an entirely different story. Your bags are meticulously packed, and your itinerary is planned down to the last detail. Read more to learn if your estate plan is just as carefully travel-proofed.

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Crossing Borders: When Your Estate Plan Does Not Travel with You

You do not need to consider yourself a global citizen or even spend most of your time outside the US to have an international footprint and cross-border exposure. Your domestic estate plan may run into a different set of legal and administrative considerations abroad. Read more to discover if you fit one or more of the following profiles.

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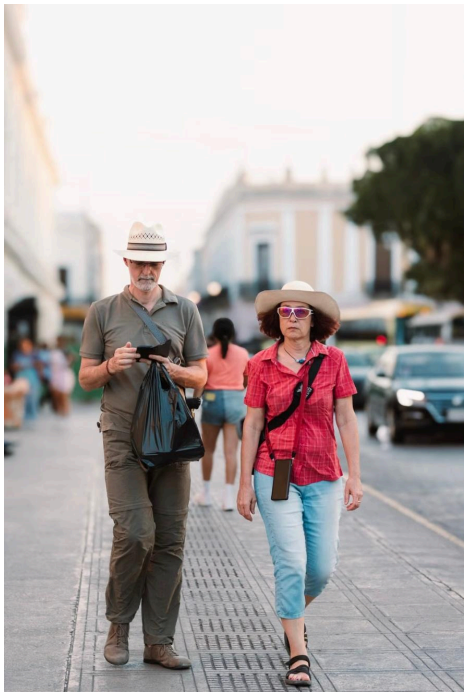



Locked Out: Why Travel Can Expose the Weakest Part of Your Estate Plan

Security features such as biometrics, multifactor authentication (MFA), and encryption may work perfectly to keep bad actors out. But in a crisis, they can leave account holders and decision-makers on the outside. Read more to learn that travel can magnify the problem by separating you from the devices, documents, people, and places you normally rely on to access important information.

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The $15 Million Question:

What the Permanent Exemption Changed, and What It Didn't

By Paula Soares, CFP®, MBA | Pence Financial Group



For most of the last decade, high-net-worth estate planning ran on a clock. Advisors and attorneys urged
families to act before a looming deadline; the scheduled rollback of the federal estate tax exemption, and
"use it or lose it" became the defining phrase of the era...

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Sowards Law Firm News!

Nicole Nijmeh, our receptionist, was accepted to Lincoln Law School. While we are sad that she is leaving us, we are excited for her to start law school! Congratulations, Nicole!



Ben and Michele Sowards' son, Noah, was recently hired by the Scotts Valley Fire Department as a fire fighter and paramedic. We wish him the best of luck in his new chapter. Congratulations, Noah!



Sowards Law Firm is pleased to announce that **Ben Sowards** has been named on the 2026 Northern California Super Lawyers list. This honor is rewarded to only the top 5% of attorneys in the state. This is Ben's 6th year in a row being a Super Lawyer. Please join us in celebrating his achievement!



If you are interested in learning more about estate planning and trusts, visit our social media pages. We have recently started posting videos everyday with information regarding estate planning, probate trust administration, and more! Click the icons below to visit our social media pages.

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