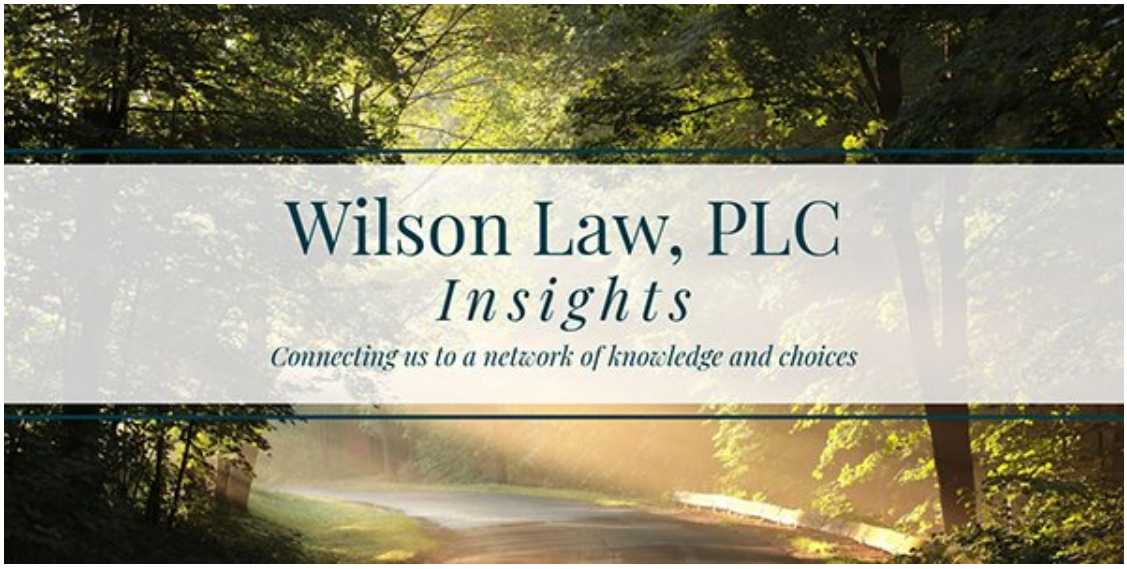


December 2025 Newsletter

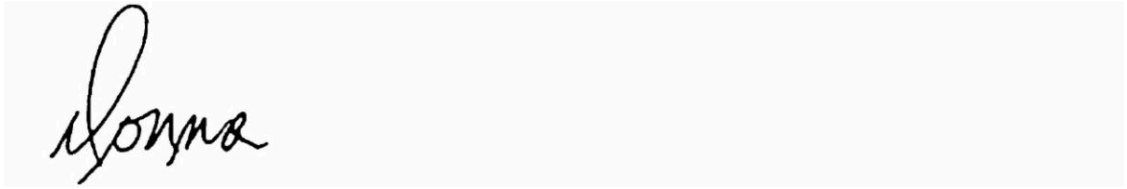
Dear Cherished Clients, Advisors, Colleagues, and Friends,

Welcome to our December newsletter. We hope you have been enjoying the holiday season and finding moments to slow down and spend time with loved ones. For many families, this is a time to think about what the year has brought and what they want the next one to hold.

In this issue, we are sharing a practical reminder about reviewing your estate plan during this transition between years, along with a few areas that are often overlooked. A simple check now can help provide clarity and peace of mind in the months ahead.

As always, we are grateful for the trust our clients place in us. We wish you a smooth transition into the new year and all the best in the months ahead.

Warm Regards,



Year-End Estate Planning Housekeeping

What to Review as One Year Transitions to the Next

As one year transitions into the next, many people naturally start taking stock of what needs attention and what they want the year ahead to look like. We review finances, tidy up loose ends, and think about what feels settled and what may need a closer look. This moment of transition is also a good opportunity to give your estate plan a brief review; not to overhaul everything, but to make sure it still reflects your life as it is today.

Estate planning is not a “one and done” task. Even when documents are well-drafted, small changes over time can quietly create gaps. A thoughtful review, whether at the end of one year or the beginning of the next, helps catch issues before they become problems for the people you care about.

Start with the Basics: Are Your Documents Still Accurate?

Take a moment to review the core pieces of your plan; your will, trust (if you have one), powers of attorney, and living will. Ask yourself a few simple questions:

- Are the people you named still the right choices?
- Are they willing and able to serve if needed?
- Do the instructions still reflect your wishes?

Life has a way of shifting plans without much notice. A move, a change in health, or evolving family dynamics can all affect whether your documents still work the way you intended.

Check Beneficiary Designations and Account Titles

Some of the most important parts of an estate plan live outside your will or trust. Retirement accounts, life insurance policies, and payable-on-death accounts pass according to beneficiary designations, not what your estate planning documents say.

This time of year is a good opportunity to confirm that those designations are up to date and **coordinated with your overall plan**. Even small oversights can lead to unintended outcomes or confusion down the road.

Review Who Has Authority—and Who Knows It
Many families run into difficulties not because documents do not exist, but because no one knows where they are or who has authority to act. Consider whether the people you named as agents or fiduciaries know:

- That they have been chosen
- Where to find important documents
- How to step in if something happens

Clear communication now can prevent unnecessary delays or stress later, especially during emergencies or periods of incapacity.

Remember the "Quiet" Changes
Not every meaningful change comes with a major life event. Over time, relationships evolve, responsibilities shift, and priorities change. Maybe a child grows more independent, a sibling relationship shifts, or the person you once trusted to handle things may no longer be the best fit. When your plan starts to feel out of step with how your life looks today, that is often a sign it deserves another look.

A Small Review Can Make a Big Difference
Estate planning housekeeping does not have to be complicated. Even a brief review can help ensure your plan still aligns with your wishes and provides clarity for your loved ones. Our clients love looking at this on a yearly basis through our Client Maintenance program.

Many people use this transition between years to note questions or changes they may want to address over time. Reviewing your estate plan now allows you to start the new year with clarity about what still fits, what may need attention, and what can wait.

When you are ready, we can help guide the next steps. Reach out through the contact form on our website or call us at 866-603-5976, and we will schedule a time to meet that fits your schedule.

Maintenance Members

We are excited with the new updates and documents we have for you this 2025/26 Maintenance year. We sent out our 2025/26 Maintenance contracts in July so if you have not received yours give us a call to reserve for this Maintenance year which is already in full swing.

Look for more fun events this new maintenance year. We started off with our annual shred it event on Saturday, October 18, 2025. Thank you to all our wonderful attendees. We had over 150 people attend and I believe everyone had a great time. I know we truly enjoyed chatting with each of you and the day was so beautiful! We were sad to have to cancel our Holiday Open House on Friday, December 5, 2025 due to the weather. We look forward to a spring event to catch up with you and hope you had a joyous season!

We thank you again for the generous donations for our pet charities! We continue to be a donation center so please keep our beloved pets in mind when you visit us! We look forward to seeing many of you at the events we have planned for the rest of our maintenance year. Check out our website under 'Events' for our Coffee with Donna, and other dates that we will add to the calendar as we schedule them. We are working on our schedule so keep an eye on our event calendar.

Why Appointment Rescheduling May Incur Additional Costs

Understanding the Value Behind the Work

At our firm, we understand that life can be unpredictable. Emergencies arise, plans shift, and sometimes it is necessary to reschedule appointments. We are always happy to work with you to find a new time that fits your needs. However, we want to be transparent about why such rescheduling—especially on short notice—will result in additional costs, particularly when your legal documents must be updated to reflect the changes.

Time Reserved for You

When we schedule your appointment, we set aside dedicated time for you—time that is specifically blocked out in our calendar. This means we turn away other clients who need assistance during that window. Rescheduling usually results in lost time that cannot be recovered or filled on short notice.

Behind-the-Scenes Work

Estate planning and legal work involve far more than just the time we spend face-to-face. Prior to your appointment, we prepare your documents, review your file, and pre-draft materials for efficiency and accuracy. When a date is changed, these documents must be re-dated, re-reviewed, and in many cases, entirely revised to maintain legal accuracy. This additional time and attention translate into added cost of time spent in staff hours, printing costs, and attorney time.

Legal Accuracy Matters

Dates are more than just calendar entries—they can have legal significance. For example, a change in the date of a trust signing, power of attorney, or healthcare directive can impact witness requirements, notary acknowledgments, or even your chosen strategy for asset transfers. To protect the integrity of your documents, we must reprocess, reprint, and in some cases, have new documents executed.

Staffing and Scheduling Impact
Changes in appointments ripple through our office. Team members who prepare, witness, notarize, and finalize your documents all work within a carefully coordinated schedule. Last-minute changes mean their time and efforts must also be redirected—sometimes involving after-hours adjustments or delays to other clients' work.

Our Commitment to You
Our goal is always to provide exceptional service, clear communication, and legal excellence. We are committed to transparency in our fees and will always explain any additional costs up front. We simply ask for your understanding and consideration when appointments need to be rescheduled.

In Summary:
We respectfully request as much notice as possible for any changes. By doing so, you help us protect the integrity of your legal documents and allow our team to continue delivering the personalized attention you deserve—efficiently and cost-effectively.

> “An ounce of prevention is worth a pound of cure.” – Benjamin Franklin

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Upcoming Events

Check out our website www.wilsonlawplc.com on our events page as we schedule our upcoming events! Also look for us on our Facebook page and our social media. We hope to see you at some of our local events below. Enjoy your January!

Virginia Peninsula Food Bank

Thursday, January 1st at 5:00pm

Langley Christian Church

175 Fox Hill Road, Hampton, VA

Join Langley Christian Church to distribute and donate bags of food to community families, in support of the Virginia Peninsula Food Bank. The mission of the Virginia Peninsula Food Bank is to effectively distribute food throughout communities, families, and veterans in need. On the first and third Thursday on every month, Langley Christian Church works to provide and distribute food to those in need within the community. For more information, click here.

'Twas the Night Before Christmas Exhibit

Friday, January 2nd from 9:00am - 5:00pm

Williamsburg Regional Library

412 North Boundary Street, Williamsburg, VA

Join William & Mary Libraries partnering with WRL Gallery at Stryker Center to celebrate America's upcoming 250th anniversary and dive into the past and learn more about colonial Christmas in Williamsburg! 'Twas the Night Before Christmas is a popular Christmas poem loved by many, influencing a range of holiday traditions and joy. This free event offers all the chance to learn about 18th and 19th Christmas traditions, including but not limited to decorations, cooking, clothing, songs, and Santa Claus! For more information about this event, click here.

MSC Bingo Night

Friday, January 9th at 6:30pm - 8:30pm

Memorial Spiritualist Church

307 37th Street, Norfolk, VA

Memorial Spiritualist Church is offering a family-friendly, fun bingo event perfect for people of all ages! For just $15 cash at the door, you get 10 games of bingo, a dauber in the color you choose, and the opportunity to win not only bragging rights but also prizes! With food available for purchase, this friendly competition is guaranteed to off all fun and a night out without a screen. If you're feeling lucky, for just $1 you can enter into their 50/50 Raffle, and you just may go home with half the jackpot! For more information, click here.

Bunco

Sunday, January 11th from 2:00pm - 4:00pm

Indian River Library

2320 Old Greenbrier Road, Chesapeake, VA

Indian River Library offers families and friends to come join library staff and neighbors to take part in an afternoon of fun playing Bunco. Bunco is a dice game which allows players to socialize with one another by dividing into teams. With the objective of rolling dices to match the current rounds number aiming to score points to win! Bring your friends and family for a free fun afternoon to learn how to play Bunco, socialize, and get involved with the local community, with light refreshments provided! To read more about this event or to become a vendor, click here.

Mahjong Mondays

Monday, January 12th at 10:00am - 12:00pm

Meyera E. Oberndorf Central Library

4100 Virginia Beach Blvd, Virginia Beach, VA

Start your week off right with Mahjong Mondays hosted by Meyera E. Oberndorf Central Library in the Central Library Large Conference Room! Join the staff in learning how to play this traditional Chinese game and socialize with those within your community! No experience necessary! You are guaranteed for a morning of fun and learning, not only about the game but also about your local community! For more information and to register for this event, click here.

Indoor Winter Farmers Market

Saturday, January 17th from 12:00pm - 3:00pm

220 North Church Street, Smithfield, VA

Join the Smithfield Farmers Market for their annual Indoor Winter Farmers Market! This is a free family-friendly once a month event filled with local foods and unique shopping experiences. Perfect for friends and families of all ages, local crafts and art are guaranteed to provide joy for all. Until Spring comes, this free indoor market is guaranteed to keep you warm and satisfied. For more information and to see the participating vendors, click here.

Barry Manilow's Wardrobe @ The Corner Pocket

Friday, January 23rd from 7:00pm - 10:00pm

4805 Courthouse Street, Williamsburg, VA

Come visit The Corner Pocket to see Barry Manilow's Wardrobe, a popular 80s cover band jam out all night long. A night filled with no repeat songs, all are guaranteed to experience a night filled with 80s wonder. With a spacious outdoor patio, friends and families are sure to have an extraordinary night of fun with great music and food. A wide selection of local beers and food are guaranteed to satisfy everyone. For more information or to purchase tickets, click here.

Board Game Meetup

Sunday, January 25th from 1:30pm - 4:00pm

York County Public Library

100 Long Green Blvd, Yorktown, VA

Join York County Public Library for their annual 4th Sunday of each month, excluding holidays, for the Board Game Meetup! Perfect for friends and families, come socialize and play with your neighbors and local community. This is a free event, York County Public Library offers a wide variety of games such as Catan, Ticket to Ride, Rummikub, and more! If these games aren't your cup of tea, be sure to bring your own game to share! You are guaranteed to not only have fun but to connect with your community. Check out more information here.

Did you read our blog this month?

Be sure to stay up to date with the latest news from Wilson Law by **clicking here**.

Love Wilson Law?

Don't keep us a secret! We love referrals and knowing that you loved our services. Don't wait to bring someone else into our client family!

Recipe Corner

Million Dollar Soup

Ingredients

- 2 tablespoons olive oil
- 1 tablespoon butter
- 2 medium sweet onions, thinly sliced
- 1 pinch salt

Parmesan Bread Crumbs:

- 1 cup panko bread crumbs
- 1/2 cup grated Parmesan cheese
- 3 tablespoons butter, melted

Soup:

- 1 tablespoon olive oil
- 1 tablespoon butter
- 1 cup chopped celery
- 1/2 cup sliced fennel bulb
- 3 garlic cloves, minced
- 1/4 cup white wine
- 6 cups chicken stock
- 3 cups chopped fresh kale
- 1 cup crumbled cooked bacon, divided
- 1 tablespoon soy sauce
- 1 teaspoon salt
- 1/2 teaspoon dried thyme
- 1/4 teaspoon pepper
- 2 cups shredded cooked chicken breast
- 1 package (8 ounces) potato gnocchi
- 2-1/2 cups shredded cheddar cheese
- 1 cup heavy whipping cream, warmed
- 1/4 teaspoon cayenne pepper
- 3 tablespoons cornstarch

- 3 tablespoons cold water

Instructions

1. To caramelize the onions, heat olive oil and butter in a large Dutch oven or soup pot over medium-high heat. Add onions; cook 4-5 minutes, stirring occasionally. Stir in salt. Reduce heat to low; cover. Cook until onions are soft, about 15 minutes, stirring occasionally. Remove the lid; cook another 20 minutes or until very soft and browned, stirring occasionally. Transfer to a small bowl; set aside.
2. Preheat oven to 350°. Line a 15x10x1-in. baking sheet with aluminum foil or parchment paper. To make the bread crumbs, in a small bowl, combine panko, Parmesan and melted butter. Spread in an even layer on the prepared baking sheet. Bake 10-12 minutes, stirring once, until golden brown. Remove; let cool.
3. To make the soup, add olive oil and butter to the same Dutch oven or soup pot over medium heat. Add celery and fennel; cook until softened and beginning to brown, 7-8 minutes. Add garlic; cook until fragrant, 30-60 seconds. Add white wine; bring to a simmer, scraping the browned bits up from the bottom until mostly dissolved, 1-2 minutes.
4. Add caramelized onions, chicken stock, kale, 3/4 cup crumbled bacon, soy sauce, salt, thyme and pepper to the pot; bring to a boil. Reduce the heat. Cover; simmer for 10-15 minutes.
5. Remove lid; stir in shredded chicken and gnocchi. Simmer uncovered until gnocchi floats to the top, 2-3 minutes. Stir in shredded cheese. Place cream in a small bowl; add a small amount of hot soup broth to the bowl to temper it. Slowly pour the mixture into the soup, stirring constantly. Stir in cayenne pepper.
6. In a small bowl, whisk together cornstarch and water. Stir into the soup; simmer until thickened, 2-3 minutes.
7. Ladle soup into serving bowls. Top each with remaining crumbled bacon and Parmesan bread crumbs. Serve immediately.

Recipe courtesy of tasteofhome.com

Learn More On Our Website

Attorney Donna L. Wilson

Before practicing law, Donna was a teacher and Special Education Consultant. Her lifelong interest in law, in combination with her experiences working to help families with special needs issues, led her to the specialized area of estate planning. Her ability to communicate effectively allows her to explain the intricacies of estate planning to her clients in a manner in which they can easily comprehend, enlightening them as to the infinite resources available to them in the designing of their estate plan.

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