



FLORIDA ESTATE PLANNING & ELDER LAW



March 2024



We wish our clients, colleagues, followers and friends a lovely Easter holiday.

Reminder that Daylight Savings Time returns this month. Turn your clocks *forward* one hour on Sunday, March 10 at 2 a.m.

All the best,
The Attorneys & Staff of The Karp Law Firm

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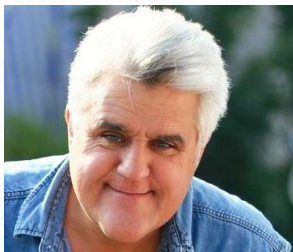


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Jay Leno Seeks Guardianship Of Wife



For 17 years, *Tonight Show* host Jay Leno kept the jokes coming. Today, his situation is no laughing matter. His wife, Mavis, has dementia. Because she no longer has capacity, Leno is asking the court for permission to create an estate plan on her behalf. It is a situation that underscores the importance of timely planning.

[Read more](#)

Unused 529 Funds Can Be Rolled Over To Roth IRA

Are you a grandparent or parent who has saved for a child's education in a 529 plan? Thanks to the SECURE Act, unused 529 monies may now be rolled over into a Roth IRA for the beneficiary.

[Learn more](#)

Honoring Clients' Last Wishes To Help Animals



Several clients who recently passed on were avid animal lovers. Attorney Joseph Karp, who they named as successor trustee and personal representative, honored their last wishes by making a donation of tangible personal property to a local humane society. We are confident our clients would be pleased to see their generosity helping homeless pets.

[Read more](#)

Speaking Engagements

A reminder that our attorneys are available to speak to your organization about a variety of topics. If you would like to arrange a speaking engagement for your social, business, community or homeowners group, please contact Debbie Karp. Call 561-472-6062 or [email her](#).

How To Find A Deceased Loved One's Life Insurance Policy

Every year, millions of dollars in life insurance proceeds go unclaimed because beneficiaries are not aware that a policy exists, or do not know



how to find the necessary documentation. Fortunately, there are steps you can take to find a lost policy.

[Learn more](#)

Need Help With Your Tax Return?



Rebecca Maglio, CPA, is available to help you with your tax returns. Ms. Maglio assists our law firm's clients and non-clients, too. If you would like to retain her services, call 561-472-6066 or [email](#) her.

Spring Training Has Arrived

It's that time of year baseball fans have been waiting for: Through March 26, 15 major league baseball teams are in Florida for spring training. According to the Florida Sports Foundation, 1.4 million fans attended the games in 2023. Enjoy!

[See where and when your teams are playing](#)

Bill Would Repeal Tax on Social Security Income



About 40% of Social Security recipients pay federal income tax on a portion of their benefits. The *You Earned It, You Keep It* Act, introduced in the House this past January, calls for eliminating tax on Social Security income. If passed, the law would become effective in 2025.

[Learn more](#)

Aduhelm No Longer Available

Aduhelm, the highly anticipated Alzheimer's drug introduced amid great controversy in 2021, is being taken off the market. According to manufacturer Biogen, starting in May participants in clinical trials will no longer receive the drug, but may be eligible for other amyloid-targeted treatments, such as Leqembi.

[Learn more](#)


Thank You For Your Referrals

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The Karp Law Firm, P.A. | 2875 PGA Blvd., Palm Beach Gardens, FL 33410, 2500 Quantum Lakes Blvd., Boynton Beach, FL 33426, 1860 SW Fountainview Blvd., Port St. Lucie, FL 34986, Palm Beach Gardens, FL 33410 (561) 625-1100

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