



## A word from Jonathan Petro, Managing Partner

It appears Spring has finally sprung in New Jersey! With some teasers of warmth in April, tempered by some inexplicably frigid days in between, I think we have broken through. The warmer weather always encourages me to take inventory of my daily life and to tackle those tasks that have lingered or have been put on the back burner. If you have put off those important items on your "to do" lists, now is the perfect time to get some things in order. **Have your estate planning reviewed and updated, file that tax appeal on an assessment that does not reflect the true value of your home or make that application for a modification of child support.** The attorneys and staff at CLDDS remain ready, willing and able to help our current and new clients with these tasks and many more! We are here to serve.



"Here, we have rebranded our newsletter as the Legal Beacon, to embrace and celebrate our community and environment here at the Jersey Shore."

*"Very thorough attorneys. They give 110 percent in the fight for their clients. Also, very caring and compassionate. Highly recommend!"*

– Laura

## Spring Cleaning from an Estate Planning Perspective

Springtime, after a long, cold, pandemic restricted winter, is a great time to not only clean and organize your home but it is also the perfect time to put your estate planning affairs in order. As you are cleaning and organizing, pull out your estate planning documents and review them. Your estate planning documents



include your Will, your Power of Attorney and your Medical Directive which is often called a Living Will. Keep in mind, there are certain times in your life when it may be beneficial to change or update your estate planning documents. Here are a few questions to ask yourself as you review your documents:

1. Were you able to locate your estate planning documents?
2. Do you have a Will? A Power of Attorney? A Medical Directive?
3. Does your family or loved ones have access to your original documents in case they need them?
4. Have you reviewed your estate planning documents within the last five (5) years?
5. Have there been any significant changes in your life since you signed your estate planning documents (such as a marriage, divorce or the birth or adoption of a child)?
6. Have any of your loved ones had any significant changes in their lives since you signed your estate planning documents?
7. Have you reviewed your beneficiary designations in your Will and related to your investment accounts to ensure they are consistent with your wishes?
8. Do you still want the same person(s) to serve as your Executor? Your agent under your Power of Attorney? Your agent under your Medical Directive?

If you answered 'No' to any of these questions, you are a prime candidate for an estate planning review. Contact Carluccio, Leone, Dimon, Doyle & Sacks and we would be happy to assist you in reviewing your estate planning documents to ensure you have a fresh start this spring.

## ATTORNEY SPOTLIGHT

### Annemarie Schreiber, Certified Elder Law Attorney

**Elder Law, Estate and Trust Administration,  
Estate Litigation, Guardianship,  
Estate Planning, Residential Real Estate,  
Adoption, Special Needs Trusts**

*"A thorough understanding of the client's needs will ensure that their desired results are achieved."*



The difference between a job and a career is passion. I came to CLDDS to pursue my passion for Elder Law. It was this passion that led me to become a Certified Elder Law Attorney.

Throughout my legal career, I have been fortunate to have been exposed to many different areas of the law. That experience has included representation of public sector clients and assisting those clients in litigation matters, various land use matters, contract matters, employer/employee matters, adoptions, and guardianship. However, it was the work on guardianship matters that truly piqued my interest in elder law. Nothing satisfied me more or felt more rewarding than helping someone who needed help. To know you made a difference in someone's life and realized that I had a passion for elder law that brought me to CLDDS. I have been given the opportunity to do something I love. I believe my passion for elder law is evident in dealing with my clients. I want to help them with whatever their needs may be, from drafting a simple Will or Power of Attorney to assisting them with more complex matters such as Estate Probate or Litigation.

Listening is key to understanding a client's needs. A thorough understanding of the client's needs will ensure that their desired results are achieved. The thought of having to deal with the many issues the elderly face is often intimidating to many individuals. I eliminate that intimidation by making the process as easy and effortless as possible for my clients. This law firm always strives to do the best for its clients, and I believe it is evident in the work produced and the results achieved.

## Employment Opportunities in Law

Carluccio, Leone, Dimon, Doyle & Sacks is seeking experienced professionals to continue our supportive, motivated and inclusive work environment. Our employees are committed to contributing to a noble mission: Serving our clients' needs first.

We offer exceptional career opportunities to our lawyers, aspiring graduates and business support professionals in an environment that is challenging, rewarding and truly different from our competitors. CLDDS is always looking for highly talented people who can demonstrate an affinity with our values to help us continue our long-standing reputation of high-level professionalism, accessibility and effectiveness.

Visit our [Careers](#) page to see available open positions.



*"When you are confident, people become confident in you."*

## In the Community

### A Starry Night Art Auction & Reception to be held on June 9th to benefit Ocean's Harbor House

The evening will highlight the artwork of the youth served at Ocean's Harbor House, a non-profit organization that provides shelter, support and services for homeless and vulnerable youth throughout the region, as well as local artists from Ocean and Monmouth Counties.

For tickets and sponsorship information, visit [OceansHarborHouse.org](http://OceansHarborHouse.org)

## About Us

### Experience Matters

The attorneys of Carluccio, Leone, Dimon, Doyle & Sacks know what it takes to represent your interests. We follow a collaborative "team" approach that allows us to maximize all available resources and provide you with the complete package in an expeditious, cost efficient, value-added manner.

Collectively, our attorneys have over 440 years of diverse legal and business experience, which enables us to offer a full suite of services. All the firm's knowledge and talent are always brought to bear on your behalf.