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OCTOBER 2022 NEWSLETTER

Another Celebrity Horror Story in the Making: **Lessons from Anne Heche's Estate**

In August, actress Anne Heche passed away suddenly at the age of 53 after succumbing to injuries she sustained following a horrific car crash in the Mar Vista neighborhood of Los Angeles. Anne Heche was best known for her roles in a variety of movies and television shows, including *Donnie Brasco* (alongside Johnny Depp), *Six Days Seven Nights* (alongside Harrison

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Ford), and *Men in Trees.*

Now, following Heche's tragic death, we have learned that she died without an estate plan (in other words, she died "intestate").

What Happens When Someone Dies Intestate?

Whenever someone dies intestate, the California Probate Court takes over the administration of the estate, under what may be a lengthy, expensive and public process (all of which might be avoided if she had a Living Trust). The Court will determine who will be in charge and how and to whom her assets, estimated to be worth $4 million, will be divided and distributed.

Heche, who was single at the time of her passing, is survived by her two sons, Homer and Atlas. Most likely, Heche's two sons will equally inherit her estate. However, there may be...READ ON

Why I Chose to Get Into Tax & Estate Planning
by Attorney, John M. Goralka

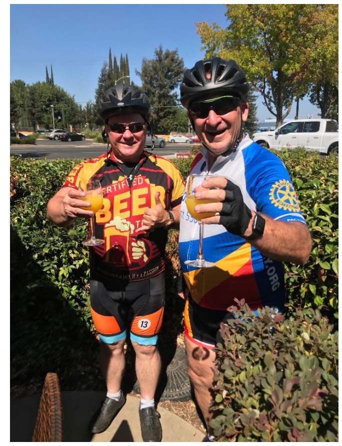
I am often asked how or why I got into the areas of planning to reduce unnecessary income tax and estate planning. I thought I'd share with you my story, particularly in light of National Estate Planning Awareness Week, which is the third week of this month.

I originally went to law school at night while I worked as an income tax auditor and hearing officer for the California Franchise Tax Board. As a hearing officer, I traveled throughout California. I handled a wide range of protests and appeals from

IN THE NEWS:
Check Out John in the Natomas Social

Contact Us

THANK YOU!



Today, October 1st, I am out riding with the Rotary Club of Sacramento and others in the community supporting the 9th Annual Sac Century Challenge. We are raising money and awareness to benefit the important work of the Sacramento Children's Home Crisis Nursery and the local kids and families they serve. There's still time to donate!

DONATE NOW

THOUGHTS OF THE DAY

"Almost everything will work again if you

complex multi-state corporations to more simplistic but emotionally charged head of household claims. This experience provided a solid foundation for the knowledge and skills used today to save taxes, estate planning, and business matters. As a hearing officer, I would have the Field Auditor's report and the taxpayer protest or appeal often prepared by large law or CPA firms. This enabled me to learn much faster from the experienced professionals on both sides of every issue. The best possible learning opportunity.

As a hearing officer, I found many taxpayers were poorly represented and positioned. I was confident that I could do far better than that. This experience was directly transferable to provide the foundation for the tax planning, estate planning, and business law practice that I conduct. Many people incorrectly view estate planning as being simplistic. But to be done well, estate planning draws upon business and property laws, federal and state income tax law and real property law, probate and trust law, estate gift tax law. Most importantly, the focus must be identifying the client's true goals and fears. Often, we help identify goals that were not thought to be possible.

Opening of The Goralka Law Firm

I began my firm in 1996 because I needed more flexibility to spend time with my kids. As a single parent with children under the ages of 2 and 5, I was coaching my daughter's soccer team, doing lunch yard school duty, and simply enjoying just spending time together. Establishing my own firm permitted that, but often required that I work late at night after putting them to bed. While this was challenging, this was one of the happiest times in my life.

An estate planning, business, and tax practice

unplug it for a few minutes, including you!"

— Anne Lamott, Author

"Stay away from negative people. They have a problem for every solution."

— Albert Einstein, Theoretical Physicist

IN THE NEWS

The Goralka Law Firm was recently featured in the *Natomas Social* magazine!

VIEW ISSUE

provided the flexible schedule that I needed. Even with that, there were... READ ON

October 17-23
National Estate Planning Awareness Week

Estate planning is an often overlooked element of financial wellness, it is estimated that over half of Americans – 56% – do not have an up-to-date estate plan! National Estate Planning Awareness Week was adopted in 2008 to help the public understand what estate planning is and why it is such a vital component of financial wellness. Assisted by Rep. Mike Thompson (DCA) and 49 additional members of the House of Representatives, H. Res. 1499 named National Estate Planning Awareness Week on September 27, 2008.

This year, National Estate Planning Awareness week is October 17th through the 23rd.

WHAT CAN / SHOULD YOU DO...

- If you HAVE NOT prepared an estate plan, it's time to do so.

- If you HAVE prepared an estate plan, have you reviewed your plan in the last 3 years and made sure that it's up-to-date with the laws and your wishes? If not, do so now!

- Talk to your friends, family, coworkers, neighbors and other loved ones about the importance of estate planning. Estate planning is not just about what happens to your assets when you die. Proper estate planning can prevent your family from going through an expensive and time-consuming Probate process (in California) and also avoid a Court Conservatorship should you become too disabled or ill to handle your affairs *while you're living.*

**For those in the Sacramento area,
call our office at 916-440-8036.**

IN THE COMMUNITY:
Joey's Food Locker Donation Day

Last month, John had the pleasure of helping sponsor a charity event for Joey's Food Locker at Bell Acqua Lake. This event was hosted by Phil Todd of the Phillip Todd Group. While great times were had by all, there were a great number of generous nonperishable food items and financial donations that were made to provide for families in need. Check out this video they made!

WATCH VIDEO

Joey's Food Locker operates a free food locker through Natomas Unified School District (at Natomas High School) to serve needy families, with staffing provided by the District’s Adult Transition Program that helps young adults ages 18 to 22 overcome mental or physical challenges by teaching them skills for living independently and getting a job.

The food locker is dedicated to the memory of Joel Michael Schwieger Jr., son of NUSD’s Adult Transitions Program teacher, Joel Schwieger and his wife Darian. “Joey” was born with autism and died at a young age, 30, but he continues to serve as an inspiration to his parents.

Hungry local residents receive canned or dried foods, while volunteer students from Adult Transition Program develop or polish skills in greeting and serving families, stocking shelves, bagging groceries, teamwork, checking food expiration dates, and keeping the locker open and operating smoothly.

The facility serves families from **4-5:30 p.m. every Friday all year long** and is located near the tennis courts at Natomas High School at 3301 Fong Ranch Road. Thank you, Phil—a great cause!

WATCH THIS VIDEO

Estate Planning & Asset Protection

A 20-Year Client Success Story

"My younger brother had a horrific work-related accident back in the mid 1980's. My parents worked with a group of attorneys to settle his case. A very large monetary settlement was paid which would have been in subject to probate fees, costs and estate tax. A part of that group was an estate planning law firm that employed John Goralka. John worked closely with my parents as he created a trust to avoid conservatorship during my brother's life, probate costs and estate tax upon his death. John was able to create that despite the fact that my brother lacked capacity due to the accident.

They later hired John to advise and help them oversee and administer the trust at his newly created law firm. John was able to put a plan in place to prevent any estate tax being due upon my brother's death. My father and John worked through a very tough time for our family and Dad came to think of John as a part of the family because John was so protective of my brother's trust.

When my father passed away, my mother became the trustee, and I accompanied her to meetings that involved the trust. I had never met John, but he earned my respect through his manner, sincerity, and knowledge of every situation we encountered. He always listened and addressed all concerns we had. He fought for us when insurance companies attempted to take advantage of my mother as she acted as trustee. The insurance company tried to avoid payment of a substantial amount due upon my brother's death. John sued, forced the release of the financial information and obtained another very large payment for the family. John has always been there for us, and I am forever grateful for all he has done for my family."

—Dave A.

Dave and his family have been clients of the Goralka Law Firm now for over 20 years and 3 generations! 😊

Also, thanks to all of our clients for their business and referrals over the years. Reviews like these are a reminder about why we do what we do and reaffirms that we are not simply just preparing legal documents, but we're cultivating relationships and really helping families and their loved ones with transformational changes for generations to come.

Can you do us a huge favor and take a couple minutes of your time to leave us some feedback and a review online at one (or more) of the following websites:

RESTAURANT RECOMMENDATION
The Waterboy

In addition to cooking, I love dining out and have a few restaurants that I enjoy and thought it would be just as fun to share restaurant recommendations (and for those that prefer or like to eat out, perhaps even better!) than the recipes we share each month. If you have any favorite restaurants you recommend (along with your recommended dishes or selections), please feel free to forward those along and we may just feature your recommendation sometime! 😊

For this month's restaurant recommendation, I am sharing about Waterboy.

The Waterboy is located off 2000 Capital Avenue in Sacramento. It is owned by chef-owner, Rick Mahan, (also the owner of OneSpeed Pizza) and has been

in business since 1996.

The Waterboy's menu offers an array of choices to meet the palate of just about anyone! VIEW MENU

Hours of Operation

LUNCH: Wednesday-Friday, 11:30am-2:00pm

DINNER: Tuesday-Thursday, 5:00-9:00pm & Friday-Saturday, 5:00-9:30pm

If you check it out (or go here regularly), be sure to let me know how you like it and what you ordered!

CONTACT US

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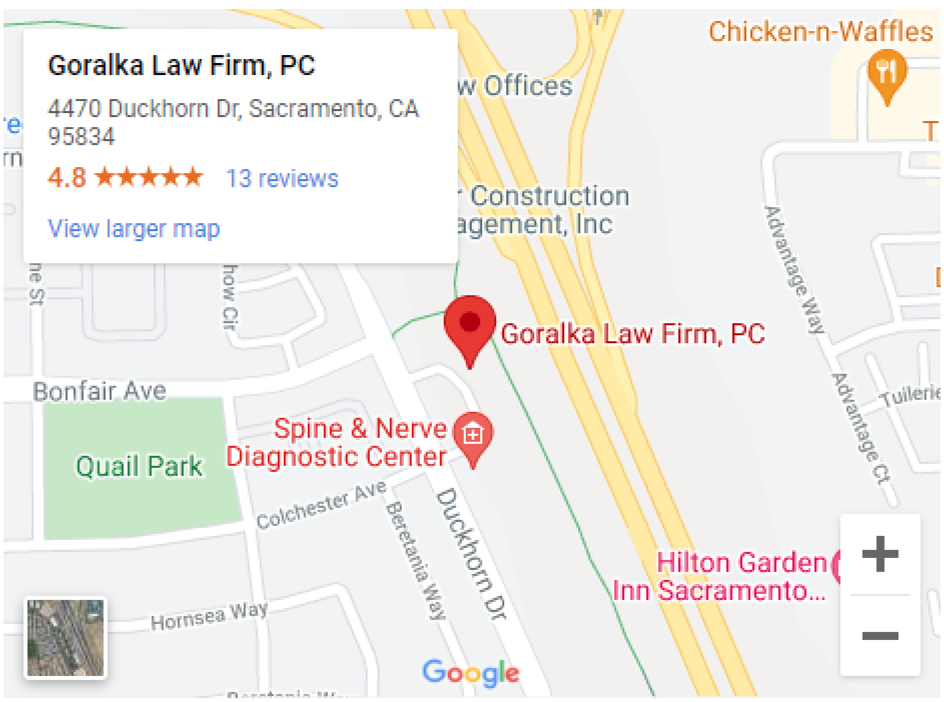

NOTE: The client testimonials featured in this newsletter and on our website are from actual clients of

The Goralka Law Firm, APC. Their last names have been redacted to protect their privacy.
These client testimonials do not guarantee your particular results.