

Thebeau and Associates, P.A.

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Have you recently moved to North Carolina from a different state?

In order to ensure that your current plans for the distribution of your assets remain valid, they will need to be updated or revised, in order to conform with North Carolina law.

Do you have a Will?

Avoid the lengthy intestacy process and ensure your wishes are taken care of, as opposed to the Courts deciding the distribution of your property.

Do you have children who are at or above the age of majority (18)?

Health Care Power of Attorneys allow a designated individual, such as the parent, to obtain information for their children or for individuals over the age of 18. Otherwise, the State can make those decisions and may leave you voiceless and uninformed.

Thebeau and Associates was founded by Cheri Thebeau in 2003 in the Lake Norman area, and has continued to grow as a Residential and Commercial Real Estate Law Practice. The firm's focus is in Real Estate Law, where Cheri has over 25 years of experience within the field. Her daughter, Brooklin has now joined the firm where the firm's concentration will incorporate Wills and Estate Planning as well.



Estate Planning is a very effective method to ensure that there is peace of mind for you and your family for the future. A proper estate plan involves strategies to minimize estate and transfer taxes, as well as coordinate the distribution of your home, investments, minor children, life insurance, employee benefits and other property.

Serving the Lake Norman and surrounding Charlotte area for over 10 years



Create plans for the protection of your pets. As important parts of your life, make sure their futures are taken care of as well.

Other Services the Firm Offers:

- ❖ Real Estate
- ❖ Wills
- ❖ Health Care Power of Attorneys
- ❖ Durable Power of Attorneys
- ❖ Trusts
- ❖ Probate Administration
- ❖ Guardianships
- ❖ Formations of LLCs, Corporations, Partnerships



Meet the Firm

Cheri Thebeau, Attorney

Cheri has practiced residential real estate for over 25 years and started Thebeau and Associates in 2003. She is married to Steve Thebeau, and has two children, Brooklin and Matthew. Cheri is also an advocate of the community and is actively involved in several different organizations such as Habitat for Humanity, Rotary Club of Cornelius, and Hope House of Huntersville. Cheri was also honored as a top Business Woman of the Year in the Lake Norman area in 2012.

Brooklin Thebeau, Attorney

Brooklin is a newly admitted attorney to the State of North Carolina, and a graduate of Charlotte School of Law where she was a Teaching Assistant for the Estates Class. She completed her undergrad at Ole Miss, where she played for the Women's Soccer Team at the university. She has also coached for several local soccer clubs. Her focus area of the law includes all aspects of estate planning. She also works with several organizations including The Cystic Fibrosis Foundation of Charlotte and The Boys and Girls Club of Charlotte.

Jena Healy, Paralegal

Jena is originally from Virginia and has lived in the Charlotte area for 23 years. She has worked with Cheri for 10 years and has paralegal experience of over 22 years. She is married to Pat Healy, and have four sons between them, Brandon, Joseph, Matthew and Chad. She is actively involved in promoting the protection of animals and has created The Reason Initiative and Make Lincoln County No Kill.

Lisa Douglas, Legal Assistant

Lisa is a new member of the Thebeau and Associates, and has become a very important and integral part of the team. She is a North Carolina native and has lived in the Cornelius area for over 15 years. Lisa has two daughters Halle and Bailey, and is very involved in many animal rescue centers and programs around the Charlotte area.

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www.Facebook.com/ThebeauandAssociates

Frequently Asked Questions:

What are the benefits of an Inter-vivos trust as compared to a normal will?

A Trust allows for the immediate transfer of assets after death without the expensive and lengthy probate process, as well as the management of affairs without a need for guardianship processes.

What does my estate include?

Your estate includes several aspects including: your home and all real estate that you own, your business, your share of any joint accounts, the full value of retirement accounts, life insurance policies, any property owned by a trust, any personal property, stocks owned, investment accounts

What simple estate planning documents should I have?

A Will, Revocable or Irrevocable Trusts, Durable Power of Attorney and Health Care Power of Attorneys are simple estate planning techniques that allow one to plan ahead and manage future problems for themselves as well as their families.

