

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

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**DONALD**  
LAW OFFICE, LLC  
WILLS, ESTATE, VA & ELDER LAW

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

**March Update:**

"Luck is believing you're lucky." – Tennessee Williams. ♣

We can help you believe you're lucky while helping your plan for your future and show your loved ones how much you care! Call or email us today to set up a **FREE** consultation!

**Donald Law Office, LLC**

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**--- AND NOW OPEN! ---**

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## The Importance of Your Attorney Having In-Depth Knowledge

As many of you know, in order for the attorneys of our office to remain active attorneys, they must complete continuing legal education courses or CLEs. Recently, one of our attorneys attended a CLE that was designed to cover the essentials of estate planning. Even though we knew this CLE would not be in depth, we thought it might be a good refresher course. Unfortunately, we were wrong!

Not only was there a scarcity of new information, but much of the information presented was incorrect - from an elder law perspective! Our attorney said, "It was clear to me that the presenters did not have a deep understanding of trusts, nor did they have the passion for protecting clients as our office does."

One of the presenters gave information on how to address the issue of "forgetting to draft a trustee powers section." At our office, we know that this section is of utmost importance when it comes to actually putting "stuff" into a trust which is called the funding process. We could not even imagine how any respectable estate planning and elder law attorney could ever "forget" about such a critical section. We understand just how important the funding process is and we are proud to say we help our clients through the entire funding process. Another presenter shared information regarding homes in revocable living trusts. This presenter stated that if one is to put the primary residence into a revocable trust, one will get "dinged" for Medicaid

purposes. This was the case for some time. However, the Ohio Department of Medicaid recently stated that it will not be counting homes in revocable trusts against the Medicaid applicant any longer!

Our conclusion - it is so important to work with experienced estate planning and elder law attorneys who have a deep and thorough understanding of the law as it relates to this field. Further, it is so important that as attorneys, we make sure to stay up-to-date with the laws! At Donald Law Office, all of our attorneys practice only estate planning and elder law so we can better serve you!

## Upcoming Workshops

**Seven Threats to Your Family Security – Estate Planning Workshop**

**\*\* TWO DATES \*\***

**Best Western Executive Suites**  
1899 Winderly Lane  
Pickerington, OH 4347

**Thursday, March 10, 2016**  
7:00pm – 9:00pm  
**Saturday, March 12, 2016**  
10:00am – 12:00pm

Avoid Losing Your Assets! Stay Home with Medicaid & VA Benefits and Keep it Simple!

Learn about how to:  
\* maintain control of your assets  
\* plan for the high costs of long-term care

\* protect and preserve YOUR life savings  
\* structure legal ownership and how it effects estate planning

**Estate Planning Essentials & VA Benefits Workshop:**

*On Behalf of Primrose Retirement Community*

**Thursday, March 24, 2016**  
3:00pm-4:00pm  
**Primrose Retirement Community**  
1481 Wesley Way  
Lancaster, OH 43130

Learn about Estate Planning basics and if you or a loved one might be eligible for FREE VA benefits!

Learn about advanced directives, what probate is &

how to avoid it, what a trust is, how to plan for costs of long-term care and how to protect & preserve your savings.

**Attend a workshop and receive a FREE no obligation private consultation with one of our Attorneys to answer any questions about setting up your estate plan.**

We are so excited about these workshops and educating families in our community about their options in protecting themselves and leaving a legacy for generations to come.

**Call or email to register today!**



## Office Happenings

We are finally getting settled in our new office in Westerville. We now have about 90% of the furniture and 100% of the automation setup. We started seeing clients on February 1 and have already helped several families in need of our services.

In the meantime, the pace has picked up for our Baltimore office as well. We are seeing more and more

people facing the crushing costs of long term care than ever before. This comes at a time when the Medicaid laws are becoming more and more complicated with each passing month. Additionally the VA is trying desperately to change the rules to make it more difficult for Veterans and their widow(er)s to receive the VA Pension Benefit.

The one thing that is certain

is that things are going to change and we know how important it is at our office to keep pace with those changes.

In order to keep pace with the changes, all three of our attorneys will be hyper-focused on elder law during the Ohio Elder Law Institute Program next month. We promise to share with you the new and exciting information we expect to learn at that event. Stay tuned!

## Staff Spotlight

This month's Staff Spotlight will be focused on our new Attorney, Jennifer M. Dick.

Jen grew up in a small town of New Bremen, Ohio and now lives in Columbus. She attended Wittenberg, where she obtained her bachelor's degree in Communication. Upon graduation, she attended

Capital University Law School where she received her Juris Doctorate.

Jen is so happy that she found the field of elder law where she can use her legal knowledge to help people plan for their futures and leave behind a legacy for their families.

In her spare time, Jen enjoys biking, reading and spending time with her friends and family. Jen is current planning & preparing for her upcoming wedding in March.

She is excited to be a part of the Donald Law Office team and is ready to help serve the greater Columbus area.

## Matt's Message

February was a difficult month for us. We are sad to say that a number of our dear friends and clients have passed away. Additionally, a very good professor of ours from law school also passed away unexpectedly.

Why do I share this with you? Is it to make you sad, as well? Of course not. It's to reemphasize to you how critically important to have your affairs in order because none of us know the date and time that we

will leave this earth. I can say with certainty that I don't want to leave my loved ones guessing as to what I wanted to happen when I pass or when I become ill.

Fortunately the friends and clients that passed last month had prepared a detailed estate plan. When their loved ones came to see us they were astounded at how detailed and clear things were for them. There was no fuss, no hassle, no arguing. Assets were clearly identified and

distributed according to the client's wishes.

In the end the legacy you will leave at the very end will largely be the one that most people remember. In our world today people tend not to remember what you did for them years ago let alone decades ago. The question always seems to be "what have you done lately?" Let them remember that you took care of them to the very end. Get your affairs in order now, before it's too late.

### Quote of the Month:

"To be successful, you have to have your heart in your business, and your business in your heart."

– Sr. Thomas Watson



At Donald Law Office, we guide you through your entire estate planning and long-term care journey!

**Our Mission is to provide peace of mind to you and your loved ones.**



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