

# Donald Law Office Newsletter

May 1, 2016

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

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Attorney

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Operations & Marketing Manager

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Administrative Assistant

## Keith Melvin

Benefits Coordinator

### May Update:

The 'oldie but a goodie' phrase, "April showers bring May flowers" reminds us of estate planning and how planning and thinking about your future (showers) ultimately shows your loved ones just how much you care (flowers)!

Call or email us today to set up a **FREE** consultation!

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

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

## Estate Planning Misconceptions

Many of us are simply too busy to get our estate plans in order. We tell ourselves that we will get to the planning process a little later. We say things like, "There is just so much going on right now" or, "Next month I will get started" or, "I just need to catch up on this other project and then I will focus on my estate plan." Sound familiar? Most of us think that it will be perfectly fine to wait until later to create our estate plan. Unfortunately, this is a common misconception.

Many of us think that if something happens to us, our spouse will be able to take care of everything. This is not true in many cases. For example, if you get into a car accident and are unable to manage your financial and legal affairs, your spouse will not be able to sign legal documents for you unless your spouse is your power of attorney. Further, your spouse could even have a difficult time making

sure all of the bills are paid, if any accounts are in your name alone.

Many of us think that a standard power of attorney document we found online will allow us to avoid any issues should we become sick or disabled. This is probably one of the biggest misconceptions out there. The laws are ever-changing and it is our job as attorneys to stay up-to-date and counsel you on these laws. Unless you practice law or work in a related field, you likely don't know what a good power of attorney document should say or specify. A very sad case recently happened in our office due to this common misconception. Mom had to go the nursing home and is now incompetent and cannot legally sign any documents. One of her adult children had a power of attorney for her that he found online. He wanted to be able to do some trust planning for mom so she wouldn't have to lose

all of her life savings to the nursing home. Unfortunately, the power of attorney did not allow for any of the specific powers (because online forms don't ever list any of these new powers). As such, we were not able to help this family. Mom will have to spend her life savings before she will ever receive any assistance in paying for her care. Had a proper power of attorney been put into place, our office could have saved mom over half of her life savings and qualified her for valuable benefits in half the time.

Don't let any of these situations happen to you! We always offer free initial consultations at our office. We can identify your goals and needs to formulate a plan that is right for you. And at our office, we have many types of plans and documents. So, even if you really just want to make sure you have up-to-date powers of attorney, we can create those documents for you!

## Upcoming Workshops

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

### Canal Winchester Community Center

22 S. Trine Street  
Canal Winchester, OH 43110

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

**Wednesday, May 11, 2016**

7:00pm – 9:00pm

**Saturday, May 14, 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 Workshops:

**Monday, June 6, 2016**

5:00pm-6:00pm

**Salvation Army**

**Samaritan Center**

228 W. Hubert Avenue  
Lancaster, OH 43130

**Thursday, June 9, 2016**

6:00pm-7:00pm

**Fairfield County**

**District Library**

219 N. Broad Street  
Lancaster, OH 43130

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

**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.**

**Call or email to register today!**



## Office Happenings

You may notice some new and innovative changes coming to our office this month. For example, we have completely redone our website. We have retained Haines Advertising to develop a more robust website. Fingers crossed, it should really look great soon!

You also have noticed a new name on the front of the newsletter, Keith Melvin. Keith is also an attorney

who graduated from Capital University Law School this year and will be taking the bar exam in July and will hopefully be sworn in as a fully licensed attorney in November once the bar exam results are released.

In the interim Keith will be our new Benefits Coordinator as Bre has become so busy as the Administrative Assistant that we needed to bring in someone to help her out

with taking care of our Medicaid and VA clients. Not only is Keith an attorney, but he is a Veteran as well.

For now, Keith will be working out of our Baltimore office but eventually he will be located in the Westerville office, working with Jen on a daily basis.

Please give Keith a big welcome when you see him!

## Staff Spotlight

This month's Staff Spotlight will be a brief update on each valued DLO team member:

Matt will be spending most of his free time in May focusing on his daughter's upcoming graduation from high school and her move to Cincinnati where she will become part of the Bear Cat Family this fall.

Nicole has been very busy with moving, her sister's wedding

and is very much looking forward to a family vacation with Rob & her in-laws to the Outer Banks. It will be baby Rose's first trip to the beach!

As most of you know, Jen recently got married in March and had an amazing honeymoon trip with her new husband to Cabo San Lucas in Mexico! They are now happily settling into married life, working to restore their old house and looking forward to a

summer of adventures.

Kristy recently purchased her first home which is very exciting, so she has been busy moving, getting settled and enjoying herself. She's very much looking forward to a fresh start!

Bre is looking forward to warm weather, planting flowers and starting her garden. She's also excited for her son's baseball season this year and spending time with her daughter.

## Matt's Message

Time and time again people ask me, "When should I do some estate planning?" and "What type of plan do I need?" Others say to me, "Why do I need to talk to an estate planning attorney?"

These are all good questions so let's tackle them one at a time starting with "When should I do some estate planning?" You should start your estate planning as soon as you have legal authority to do so. For example, we tell people that the basic estate plan is vital to those who want to make sure that someone can speak for them if they become incapacitated. Think of it this way, you're 18, you're off to college or a new job and you

are seriously injured in a car accident and you need to have someone represent you in a lawsuit (either as a defendant or a plaintiff). Who is going to be able to do that? The parents? The wife/husband? Not necessarily. First there will need to be a guardian appointed to determine who that individual will be. It's not automatically the parent or spouse of the injured person.

Second question, "What type of plan do I need?" This is a bit tougher of a question. The short answer is, it depends on what is important to you. The long answer is that it is impossible to make a recommendation without meeting with someone prior to make a

recommendation so we can determine his or her needs.

Lastly, "Why do I need to talk to an estate planning attorney?" Like it or not, almost everyone, and I mean everyone (or his/her estate representative) meets with an estate planning attorney eventually. People either meet with one when he/she are healthy and able to make choices, or someone meets with an estate planning attorney on his/her behalf when they aren't able to make choices, or someone meets with an estate planning attorney on behalf of his/her estate when he/she has passed away. Everyone meets with us eventually. Sooner is always better.

### Quote of the Month:

"Rough winds do shake the darling buds of May." – William Shakespeare



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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