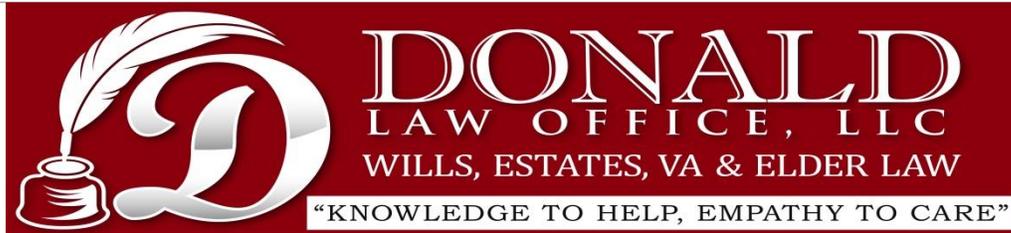


"KNOWLEDGE TO HELP, EMPATHY TO CARE"

**Matthew W. Donald**  
Founding Attorney  
**Jennifer M. Moore**  
Attorney  
**Keith M. Melvin**  
Benefits Coordinator  
**Kristy Pinion**  
Operations & Marketing Manager  
**Ambreanna Cyrus**  
Administrative Assistant



## December Update:

Please accept our heartfelt thanks for being one of our cherished clients and partners! We appreciate you and your business and wish everyone a very **Merry Christmas and a Happy New Year!**

[info@donaldlawoffice.com](mailto:info@donaldlawoffice.com)  
[www.donaldlawoffice.com](http://www.donaldlawoffice.com)

**Baltimore Office:**  
600 West Market Street  
Suite D  
Baltimore, OH 43105  
(740) 400-4194

**Westerville Office:**  
38 Commerce Park Drive  
Suite B  
Westerville, Ohio 43082  
(614) 423-8570

**Fax**  
(740) 400-4195

**E-mail**  
[info@donaldlawoffice.com](mailto:info@donaldlawoffice.com)

**Website**  
[www.donaldlawoffice.com](http://www.donaldlawoffice.com)

## Gift Taxes

As we prepare to celebrate the holiday season, many people wonder how they can give gifts to their friends and family or to their Family Trust without being penalized by the IRS. A question that we get quite often from the families we assist is, "How can we give money to our kids without having to pay a gift tax?"

Technically, the IRS states that any gift is a taxable gift; however, there are several exclusions that allow families to make gifts without the gift being

deemed taxable.

One exception occurs when a gift does not exceed the annual gifting exclusion. Beginning January 1, 2013, the annual gift exclusion was listed at \$14,000 and will remain the same for 2017. What this means, is that you can gift \$14,000 to any person without ever needing to pay a gift tax. If you are married, that amount doubles, as you can each give \$14,000 for a total of \$28,000 to a single person. In this scenario, the only time a tax issue comes into play

is if you were to gift more than \$14,000 (or \$28,000 if married) to an individual. Even if that occurs, there are various ways to assure gift tax is either a small issue or not an issue at all.

As we are not accountants here at Donald Law Office, we work very closely with our clients and their accountants and financial advisors to ensure their gifting plans are set up properly to give them the most tax-advantageous strategy to give gifts to their loved ones.

## Upcoming Workshops

### Estate Planning Essentials & VA Benefits Workshop:

*On Behalf of Enlivant  
and Carroll Place*

Tuesday, January 24, 2017  
6:30pm-7:30pm  
**Carroll Place Senior Living**  
**3682 Dolson Court NW**  
**Carroll, OH 43112**

**Call or email to register  
today!**



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.



## Office Happenings

A few end of the year notes from Donald Law Office:

We had a very successful In-Service Day last month and can't wait to kick off 2017 with a fresh start and hit the New Year with our feet running. We had a working breakfast at Bob Evan's and then had our very own Veterans', Matt and Keith, show the ladies how to shoot at Ohio Valley Outdoors. We had a very productive

meeting and had lot of fun that afternoon!

Our next team get together will be this month for our company Christmas party! We had so much fun at Shaw's last year that we decided to have it there again this year! We look forward to good food, drinks, conversation and company!

Please note that our offices will be closed on

Monday, December 23<sup>rd</sup> and Monday, December 26<sup>th</sup> so that we can spend time with our families for Christmas. As for New Year's Day, we will be back in the office on Tuesday, January 3<sup>rd</sup>!

**From our family to yours, have a very Merry Christmas and a Happy New Year! We'll see you in 2017!**

**Quote of the Month:**  
"December is the month of celebrating, happiness, joy, gifts, family gathering, food & candy. This is the month where we celebrate the birth of the Light, light a candle and feel at peace with the world."



## Matt's Message

If you know me, or have ever heard me speak at one of our workshops, you know that I am always preaching about having a plan in place because you never know when something might happen to change your life, or the lives of your loved ones, forever. Within the last two months that "something" has struck two of us in our office on a very personal level, including me.

I won't share the details of the other staff member that lost someone but I want to share with you what happened to me.

On Saturday, November 12, I was presenting a workshop in Delaware. During the break I stopped to check my voicemails

(which I normally do not do). I had a voicemail from my mother telling me my cousin had suddenly and unexpectedly passed away from what we believed to be, a massive heart attack. He was 54.

Two weeks prior to his death, my cousin, whom I was very close to, had a physical and his doctor gave him a "clean bill of health". I am not faulting the doctor because from all indicators he was in great shape.

My point is simply that you never know when something tragic might strike. My cousin lived out of state so I did not prepare his estate plan. In fact, as of right now, I am not even sure he had an estate plan. I do know however, that his wife and siblings are, in their

words, "muddling through things" right now rather than being able to focus on their grief and each other.

My cousin is gone, and I loved him dearly, but he isn't the one having to deal with the fallout from his death, all of us are, but most especially, his wife and children.

Please, for the sake of the people you love, create a plan and share that plan with your family.

There is no greater gift you can give them this Christmas than the peace of mind that comes with doing so.

My cousin Jamie was a man of deep faith, so rather than say rest in peace, I will say live in peace Jamie, we will miss you.

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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