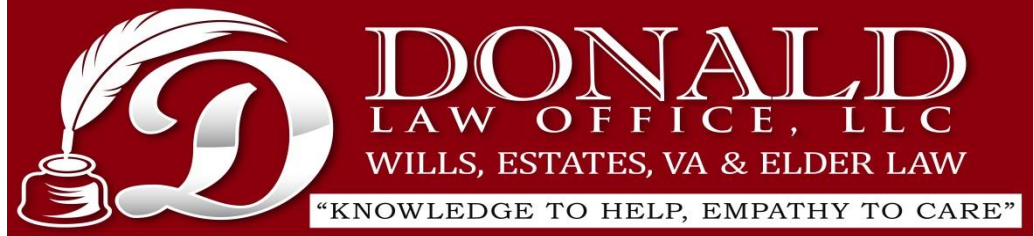


"KNOWLEDGE TO HELP, EMPATHY TO CARE"

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



## February Update:

Just because it's the month of LOVE... ♥♥ To quote Steve Jobs, who said, "The only way to do great work is to love what you do." Well, we truly love what we do here at Donald Law Office. Call our office today for a free initial consultation!

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**Please make a note of our  
NEW Westerville office  
address and location!  
More in "Office Happenings"!**

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## Funding a Trust

Creating a trust is the first step of preparing an estate plan for many families. However, executing the trust is not necessarily the most important part of the process.

Many clients come into our office with a beautiful binder filled with fancy legal paperwork. However, when we ask the clients what is actually owned by their trust, we are often met with blank expressions.

Funding is one of the most important aspects of

creating your trust plan. Funding simply means retitling assets into the name of your trust. Unless each asset (including bank accounts, financial accounts, real property, etc.) is properly re-titled into the name of your trust, the trust will not control its disposition. For instance, if you leave specific instructions within your trust to gift your house to your grandkids when you pass away, but fail to retitle your house into the name of your trust, the trust would not control where your house goes upon your passing.

Instead, it would be distributed according to the terms of your will or the laws of intestacy in the state you reside, which means a trip through the probate process.

Not all assets can be funded into your trust during your lifetime; however, it is important to review all of your assets to ensure they are either transferred into your trust, or in the alternative, titled in a way to best avoid probate.

## Upcoming Workshops

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

*On Behalf of Enlivant  
and Carroll Place*

Tuesday, February 7, 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.

Keep an eye out for  
a unique partnership  
workshop  
opportunity – more  
on this to come!



## Office Happenings

Our Westerville clients spoke and we listened! Many clients have told us that our Westerville location on Commerce Park Drive is difficult to find and can be tough to get in and out of at times due to traffic and construction on North State Street. Many have also asked us if we had considered a location closer to I-71 off

Polaris Parkway. In response to the suggestions, we have been researching locations for the past couple of months and we think we have found the perfect place: 470 Olde Worthington Road, Suite 200 Westerville, Ohio 43082. Besides the location, the only other thing that had

to change was the phone number. The number to reach us is toll-free: 844-400-4194.

And, of course, our Baltimore office is still available to meet with clients, as well! We are super excited about our new Westerville location and look forward to continuing to serve you and your clients' needs.

## Staff Spotlight

This month's update will be on Kristy, our Marketing & Operations Manager.

Kristy made a couple of New Year's resolutions this year, which include to start working out again and to try to be less stressed in general, which are both definitely easier said than done! Key word there is TRY.

Kristy and her husband, Matt, recently joined the YMCA in Lancaster and while she enjoys their fitness classes, he likes working out in their Wellness Center. They both are very competitive and enjoy playing racquetball together! Other than that, she is looking forward to things settling down and

slowing down after the holiday season whirlwind.

They want to finish putting some final touches on a house they hope to sell this spring and are looking forward to a low-key winter spending time with their family and friends and then quality time at home together.

## Matt's Message

If you know anything about our office you know that we constantly advocate planning to our families, friends, and clients. But planning isn't enough; it is merely the beginning.

Estate planning is really a three step process: planning, execution and review. We can help you create the best plan ever, but if you don't execute the estate plan, meaning follow through with the

steps we recommend, then all of the effort, time and money you invested into your plan will have been for nothing.

I cannot emphasize how important it is to execute the estate plan by designating the proper beneficiaries, transfer on death recipients, payable on death recipients, etc. on your accounts or to retitle your assets into the name of your trust.

Last, but not least, is review. You must review your estate plan because things change constantly - laws change, family situations change, assets change, and on and on. Keep your estate plan up to date with a free review every three years at a minimum. But remember, if you are in our maintenance plan then we will review your plan every year with you at no additional cost.

### Quote of the Month:

"Optimism is the faith that leads to achievement. Nothing can be done without hope and confidence."  
-Helen Keller



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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