

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

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DONALD
LAW OFFICE, LLC
WILLS, ESTATES, VA & ELDER LAW

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

March Update:

"Luck is what happens when preparation meets opportunity."

Make sure you are "lucky" this year by making sure you are well prepared and have you and your loved ones' estate planning

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Knowledge is Power!

The theme for this month is learn, learn and learn! On March 16 & 17th, Jen and Matt will be attending the annual Ohio Elder Law Institute conference hosted by the Ohio State Bar Association.

The conference will be completely focused on the current issues in elder law. Topics will include the use and requirement of qualified income trusts, nursing home litigation,

trust administration, advanced directives on day one. Day two will cover updates to the law, rights to die issues, guardianships, financial exploitation of the elderly, and Veterans Benefits taught by none other than our very own, Matt!

As many of you know, assisting Veterans is a passion for our office and we are thrilled to have the opportunity to present to the rest of

the elder law community information. By ourselves as an office, we can only do so much to help these Veterans and their families. But by sharing this information with the Elder Law Institute, all of the attorneys and advocates at the conference will be able to take this information back with them and have an immediate impact on the lives of our Veterans and their families!

It's Everyone's Favorite Time of the Year – Tax Time!

When referring to the likelihood of the permanency of the Constitution, Benjamin Franklin said, "In this world, nothing can be said to be certain, except death and taxes." Well the fact that you are reading this means that you have avoided once certainty, but the other is out waiting: taxes.

Perhaps the only ones who look forward to tax season are accountants and perhaps no one looks more forward to the end of tax season

than accountants as well!

One of the most confusing areas of the law can be taxes, even for professionals who work in the field every day. And perhaps one of the most confusing areas of tax law is taxation of trusts. Questions arise on a constant basis such as who pays the tax on the money the trust makes? Is there a tax on money given from the trust to a beneficiary?

Well, in keeping with the

theme of the month of learning, Jen and Matt will also be attending a dinner and training event on March 16th, which will be sponsored by the Central Ohio Tax Club. The training will actually be conducted by Matt for a group of CPAs and other accounting professionals. Topics will include taxation of trusts, the difference between grantor trusts and non-grantor trusts, simple versus complex trusts and many other fascinating topics that most likely only lawyers and accountants would find interesting!

Office Happenings

As last month's newsletter touched on, we have officially moved our Westerville office location to:

470 Olde Worthington Rd
Suite 200
Westerville, OH 43082

This office location is right off of Route 71 & Polaris Parkway – coming north on Route 71 from Columbus, turn right onto Polaris Pkwy, turn right onto Orion Place and you will see the building directly in front of you with the address 470 visible on the building. Turn left onto Old

Worthington Road and enter into the parking lot on the right.

Upon entering the building, you will use the elevators straight ahead and to the right and go up to the 2nd floor. Immediately to your right, is the lobby to the new office, where you will be greeted by a warm receptionist.

Besides the new location, the only other thing that had to change was the phone number. The

number to reach us toll-free is (844) 400-4194.

NEW LOCATION, SAME GREAT SERVICE!

The new office seems to be working out nicely – great location & easier to find/access. We are super excited about the new location and look forward to continue serving you and your clients' needs!

As always, we still have our Baltimore office available to meet with clients, as well!

Quote of the Month:

"I am a great believer in luck, and I find the harder I work the more I have of it."

–Thomas Jefferson



Staff Spotlight

Even though last month's Staff Spotlight was JUST an update on Kristy... this month is another EXCITING update as her husband has just started his own landscaping business – PINE Landscape & Design, LLC. Not to worry, Kristy isn't going anywhere and will still be working here full-time!

Her husband, Matthew Pinion, worked as a service manager in the auto industry for over 15-years and felt stressed and unfulfilled in his

career, which led to PINE Landscape. The name originates from the Pinyon Pine tree, which is a play on their last name and appears in their business logo, as well.

PINE Landscape & Design, LLC serves the Central Ohio metro area and specializes in the design and build of landscaping/hardscaping customized for you and your yard.

They're so excited about this

opportunity and hope that everyone else will be too, so please feel free to "Like" and "Share" their PINE Landscape & Design business page Facebook!

Please call Matt at (614)309-5250 or check them out online at www.pinelandscapeanddesign.com if you have any upcoming projects, from customized landscape design to outdoor fireplaces to simple grass cutting, Matt enjoys it all!

Matt's Message

This month I would like to expand upon the learning theme and delve into the statement, "You don't know what you don't know." So many people are getting advice from loved ones or reading things on the internet that are completely inaccurate. For example, last month alone, I had no less than five people tell me they wanted me to prepare a living will for them. When I asked them what they hoped to accomplish with their living will they said something to the effect

of, "I want to make sure my stuff goes to the right people."

Well if you are a client of ours you know that a living will isn't going to accomplish that goal and that a living will is a legal document that typically controls end of life decisions. What those people were interested in was a will, plain and simple, or is it? When I explained the difference they said that they wanted a will to make sure they avoided probate. Again, if you are a client of ours, you know that if your

will is going to control your estate when you pass away, your estate is going to have to go through probate.

So what's the point to all of this? Tell your loved ones to take the time to talk to a professional about these things. As well intentioned as our friends and loved ones are, they should not be the ones providing advice about what is needed for an estate plan. Tell them to give us a call or to attend one of our free educational seminars.

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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