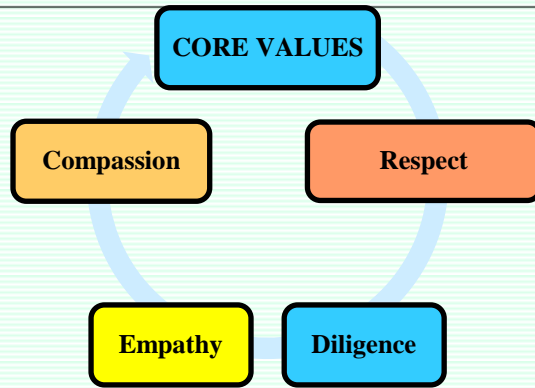
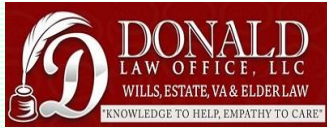


Donald Law Office Newsletter



Our Mission: To provide peace of mind to you and your loved ones.

Matthew W. Donald
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Nicole M. Hawks
Attorney
Nancy Landis
Executive Assistant
Dawn Malone
Office Manager
Sarah Gallenstein
Client Services Coordinator

Newsletter

Different Types of Legal Ownership
Joint- You can own things joint with another. For example, you might have a joint checking account with your spouse and you might own a home together.
Beneficiary Designations- You can decide who want to leave certain assets to when you pass. For example, you can specify that your IRA will go to your spouse or your children when you pass away.
Payable on Death (POD)- You can make sure that your checking and savings accounts go directly to someone of your choice once you pass. For example, you might have a payable on death to your child for your savings account.
Transfer on Death (TOD)- You can make sure that your house or car goes directly to someone of your choice once you pass.

The great thing about doing beneficiary designations, PODs, and TODs is that these will all avoid probate IF the people you leave these accounts and titled properties to have not predeceased you. For example, if you and your loved one whom you specified things go to, both pass away at the same time, then those accounts may have to go through probate.

While beneficiary designations can be a great tool, there are other issues that could arise. For example, you might leave everything to your spouse with the intention that your spouse would leave everything to your children. But, if your spouse has to spend all of that money on the nursing home or gets sued, the assets could be lost and your children would be out of luck. Also, what happens if your spouse gets remarried? The new spouse will likely get a big chunk of your money that you wanted to go to your children. Or what if your spouse does leave the money to your children and your children spend it away frivolously, or get into a lawsuit?

There is a way to AVOID all of these issues and only every have to make one change rather than numerous changes to all your asset beneficiaries. It can be done with a trust. Find out more by calling us!

Special Deals
Receive 20% OFF a Transfer on Death Affidavit!
CODE: JUNETODSPECIAL
(expires June 30, 2015)

Monthly Update
It's June! Summer is just beginning. Now is the time to relax and enjoy the beautiful weather. It's easy to relax when you know your estate plan is taken care of. At Donald Law Office, we help you through the entire estate planning process. From basic document preparation, to guidance with complex asset structure, we help with you with everything!

Special Events
OPEN HOUSE! Cookout at Donald Law Office. FREE food, FREE PRIZES, Coupon for FREE ice cream from Schaffner's, and more!
Friday, June 12, 2015
11:00 am – 2:00 pm AND
5:00 pm – 8:00 pm

Quote of the Month
“When writing the story of your life, don't let anyone else hold the pen.”
-Anonymous

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