

"KNOWLEDGE TO HELP, EMPATHY TO CARE"

**Matthew W. Donald**

Founding Attorney

**Jennifer M. Moore**

Attorney

**Bethany Peters**

Office Manager

**Ambreanna Cyrus**

Benefits Coordinator

**Kendra Crowell**

Receptionist

We can help you be prepared and give you that sense of calm while helping you plan for your future and showing your loved ones how much you care!

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

**Office Location**

719 West Market Street  
Baltimore, OH 43105

**Phone**

(740) 400-4194

**Fax**

(740) 400-4195

**E-mail**

[info@donaldlawoffice.com](mailto:info@donaldlawoffice.com)

**Website**

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

## Trust Funding: An important step of trust planning

Creating a trust is an important 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.

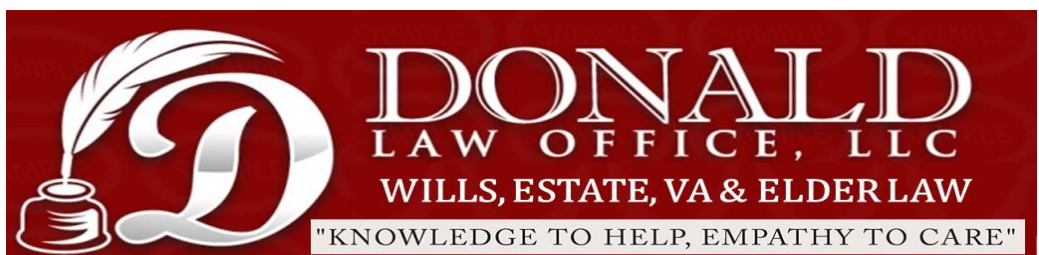
If you fail to fund something, what happens to that asset depends on the circumstances. It could pass to the joint owner if it is a jointly owned asset. It could pass through your will, requiring probate. It could be distributed according to the laws of intestacy in

the state you reside if you pass away without a will, also requiring a trip through the probate process.

This gets even more complicated if this was a second marriage and you had children from a prior relationship.

A trust eliminates many of these common issues, but if it isn't funded properly, these issues cannot be avoided.

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.



## Office Happenings

As the state begins to lessen restrictions and businesses reopen, our office is adjusting our Covid policies. As of June 1, all of our staff members are now back in the office full time.

Our office has been extremely lucky to be able to remain open to service the needs of our clients as an essential business, and we are ready to get closer to normal business operations.

For the time being, to further help limit the spread of the Coronavirus, we will continue to keep our office closed to walk-ins. In lieu of in office appointments, we will continue to utilize video and telephone conferences where possible to meet with clients. We are also conducting "drive up" signing appointments to further limit exposure, while allowing us to witness and notarize documents.

Starting June 1, our office will adjust our office hours to Monday – Friday from 9am – 4pm.

However, we are still limiting the amount of walk-ins, so we ask that you call to make an appointment.

Before Covid, our office began a wellness program to allow our staff time to exercise and work on their personal fitness. With the gyms reopening, we are bringing back the wellness program so our staff can

## Staff Spotlight

This month's Staff Spotlight will be focused on our Benefit's Coordinator Ambreanna Cyrus. You may know her better as Bre.

When Bre isn't in the office working to help our clients obtain VA and Medicaid benefits, she can usually be found running her two children to after school activities, practices, etc.

However, during the current health crisis, schedules

have been a bit different and Bre has been enjoying the slower pace of things.

In August of 2019, Bre purchased her first home. Quarantine has allowed her to accomplish quite a few home improvement projects.

With a little help from YouTube, Bre has built a wall, hung a door, laid some flooring, and been painting like crazy.

She is becoming quite the handywoman!

Although Bre and her children have been greatly missing many things such as Grandma hugs, baseball games and playdates with friends to name a few, they have been enjoying the quality, uninterrupted time they have been able to spend with each other at home.

## Matt's Message

Good news – summer isn't cancelled!

The sun is back, the weather is warm, and Covid can't take that away from us.

As summer returns to Ohio, I have been busy getting ready for the warm months ahead.

This month, my family and I are going to Myrtle Beach for our summer vacation. After the long quarantine, we are very excited to enjoy some sand and sunshine.

With two daughters in

college and a son in high school, we are lucky to have a family vacation that allows us to spend some quality time with one another.

As summer arrives, and we are able to get back to some normalcy, I want to remind everyone of the importance of reviewing your estate plan.

We often meet with new clients who think they have what they need, or think that they have their estate plan finished and prepared the way they intended, but on closer review, we find that something is missing.

Whether it be a lack of funding, incorrectly prepared or executed legal documents, or simply not understanding the law and how it may impact their estate plan, we often find holes that need to be repaired.

Let us take a look. If things look good and will work as intended, we'll tell you. If we think they could use a tweak, we'll tell you. We want to make sure all of your wishes are in place and will work as you intended before something happens where adjustments can no longer be made.

### Quote of the Month:

"Spring being a tough act to follow, God created June."  
-Al Bernstein



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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