

TRUSTS AND ESTATES AND ELDER LAW SERVICES

I offer a full line of advice and services involving estate planning, estate administration, and elder law planning. Services and advice are highly customized and personalized to your needs. Early and abundant consultations are conducted before any documents are drafted. Although I help many clients with drafting and administering trusts of all types, I do not sell cookie-cutter, fill-in-the-blanks trust forms "off the shelf."

Among the documents many clients consider in these areas of the law are:

Last Wills and Testaments

Inter Vivos or Living Trusts (Both revocable and non-revocable)

General Durable Powers of Attorney

Advance Medical Directives (Including, if wanted, any or all of "living will" provisions, appointment of one or more agents for health care decisions, and/or organ or tissue donation provisions)

Testamentary Trusts

Charitable Remainder Trusts

Life Insurance Trusts

Special Needs Trusts

Frequently, clients doing estate planning need attorney advice regarding the implications of the Federal Gift Tax, or the Federal Estate Tax, or the Federal Generation-Skipping Transfer Tax for their situations. I am equipped to offer advice on federal tax implications of estate planning or administration including tax return preparation, and representation of individuals, estates and trusts before the IRS or before the United States Tax Court.

Some persons are unable to attend to their legal, medical, financial, and personal needs due to one or more temporary or long-term physical or mental disabilities. In such situations, Virginia law allows a petition to the Circuit Court for the appointment of a guardian or a conservator, or both. As a Virginia attorney, I can help the disabled person, or family, or friends with such proceedings before the Circuit Court, where the medical and other evidence warrants.

In general, Medicare does not pay for long-term institutional care. For some indigent patients in long-term institutional care, Medicaid can provide assistance, but many clients and their families can benefit from advance Medicaid planning whereby patient plans are made and some assets can be protected before the client becomes indigent for Medicaid purposes. I do Medicaid planning as a part of my elder law services.