

“Let our advance worrying become advance thinking and planning” – Sir Winston Churchill

C. DAN CAMPBELL, P. C.

ELDER LAW TODAY

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SPECIAL EDITION

JANUARY 2021

Greetings and Happy New Year from all of us here at the firm!!

We all know these are trying times. This global pandemic has brought huge challenges to all of us. Although we have taken precautions since the beginning of the pandemic, we want to continue to take measures to keep everyone safe. That brings us to this “**Special Edition**”. As always, we are happy to schedule a typical, in person office conference for any current or potential client with COVID-19 safeguards in place.

We do, however, understand that we have some clients that want to stay at home and not venture out to a law office even though they may need legal services — particularly estate planning documents. So, if you or someone you know is in that situation, we are offering “remote estate planning”. Here is how it works:

1. If you do not have a Will, Revocable Trust, Statutory (Financial) Durable Power of Attorney, Medical Power of Attorney, HIPAA Release or Directive to Physicians we can prepare those documents.
2. If you already have a Will, Revocable Trust, Power of Attorney, etc. that you want to have reviewed and possibly modified, you may mail us a copy (not the original) or fax or email the document to our office.
3. Danna will schedule a free 30 minute telephone conference or video conference with us to discuss what you need to have done.
4. At the conclusion of that conference, we will assess your needs and provide you a written agreement as to what we will do for you and what the charges will be should you decide to proceed.
5. After we get the written agreement back from you, our office will prepare a draft of your documents and mail or fax them to you for your approval.
6. Once you approve the documents we will ask if you desire us to come to your home to supervise the signing of the legal documents including notarizing same. We would need you to

provide two (2) witnesses in the case of a Will.

** If you prefer to come to our office to sign the documents we will provide the witnesses. Again, our office has COVID-19 safeguards in place.*

If this is something you would like to further explore, please call our office to schedule your free 30 minute telephone or video conference.

The Critical Need for Current Wills and/or Revocable Trust and Statutory (Financial) Durable Powers of Attorney

Your Will

When should my Will and/or Revocable Trust be reviewed?

- At least every three years.
- Furthermore, anytime there is a significant life change (i.e., Alzheimer’s/dementia, deaths, births, adoption, divorce or change in tax law) you should review your Will or Revocable Trust to make sure it’s current.

Your Statutory (Financial) Durable Power of Attorney

Is a current Statutory (Financial) Durable Power of Attorney necessary?

- This is perhaps the most important estate planning document to have! Simply stated, if you do not have one and become incapacitated, a guardianship will have to be taken out. The judge will appoint someone (who you might not want or even know) to manage your financial assets. A guardianship is a very expensive and time intensive court process that may have to continue for your lifetime!

Legal Services We Provide:

- **Estate Planning** (Wills, Revocable Trusts, Statutory (Financial) Durable Powers of Attorney, Medical Durable Powers of Attorney, HIPAA Releases, Directives to Physicians, Special Needs Trusts)

- **Medicaid and Asset Protection Planning** (Ladybird Deed, Qualified Income Trust, Intentionally Defective Grantor Trust, Qualified Domestic Relations Order, “Medicaid Compliant” Annuity, “Spend Down” Techniques and Gifting Strategies Including UTMA Gifts)
- **Probate** (Independent Administration, Dependent Administration, Small Estate Affidavit, Affidavit of Heirship, Muniment of Title)
- **Guardianships**
- **Veterans Aid and Attendance**
- **Estate and Trust Litigation** (Will Contests Etc.)



Standing left to right: C. Dan Campbell & Dean Godfrey. Seated left to right: Cindy Lamb, Danna West & Hope Butterfield

Our law firm has over 40 years experience.

C. Dan Campbell, Attorney:

Doctor of Jurisprudence ♦ Certified Public Accountant
♦ Board Certified Texas Board of Legal Specialization:
Estate Planning & Probate Law; Civil Trial Law

Dean C. Godfrey, Attorney:

Doctor of Jurisprudence ♦ Master of Business
Administration

We appreciate you as our client or prospective client and it would be our privilege to assist you in these trying times.

Our mission: *To provide our clients with highly effective, accurate, timely legal services.*

Elder Law Today is written by C. Dan Campbell, Attorney at Law, who is Board Certified by the Texas Board of Legal Specialization in Estate Planning and Probate Law and Civil Trial Law. This newsletter is not intended to be construed as the giving of legal advice. Before taking any action referred to in this newsletter you should consult with an attorney who is knowledgeable in this area of law. This newsletter is published as a service of C. Dan Campbell, P.C., 4245 Kemp Blvd., Suite 800, Wichita Falls, Texas 76308. Visit our website at www.cdancampbell.com. We are dedicated to providing solutions for seniors.

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