

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

C. DAN CAMPBELL, P. C.

# ELDER LAW TODAY

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## SPRING 2021

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Welcome to Elder Law Today, Spring Edition!

It's been a while since we visited. And the "great blizzard" of February is now past! Minus 7 degrees was brutal, wasn't it? Hope you and yours have remained safe during the covid and have gotten your shots. I experienced a very mild case about Thanksgiving and have gotten Moderna shots. Everyone in our family and in our office family are well.

During our Firm's weekly planning conference, we all said "let's give another live seminar" and we are going to do just that on **Tuesday, May 25<sup>th</sup>** and on **Thursday, May 27<sup>th</sup>** at the **Homewood Suites, 2675 Plaza Pkwy, Wichita Falls, Texas 76308 from 6:00 -7:30 p.m.** We are limiting the number of folks to **35** at each because of ongoing concerns about covid and are recommending masks. What are we going to talk about? These are the topics at the time of this writing (we can add more if some of you want to hear about something else).

### Tuesday, May 25:

Critical estate planning documents everyone should consider:

1. Wills
2. Financial (statutory) Durable Power of Attorney
3. Medical Durable Power of Attorney
4. HIPAA (medical privacy) Release
5. Directive to Physicians (living will)
6. Revocable Trusts (who needs it and who doesn't)
7. Gifting – what you need to know *before* you make a gift!

Finally, "estate taxes" – where we are and where we are going?

### Tuesday, May 27:

Asset protection planning from a Medicaid perspective. We will cover these topics:

1. The best way to protect your assets if long term (nursing home) care becomes necessary
2. Crisis vs. non-crisis planning
3. Protecting your homestead from Medicaid Estate Recovery
4. Protecting your farm, ranch or other business
5. The 5-year asset protection trust
6. Gifting strategies – the right way and the wrong way!
7. The right kind of durable power of attorney (and the wrong kind!)
8. The "spousal care trust Will" and why you may need one

Many of you are already familiar with these subjects, but a refresher is always in order which is why we are doing these two seminars. There is **no charge** and refreshments will be served. Again, we are asking guests to wear masks and socially distance. We will be limiting guests to **35** for each seminar and reservations are strongly recommended because of this limitation. Also, we will be advertising these seminars in the Times Record News and on social media. So, if you are interested, I recommend making reservations as soon as possible.

That's it for now. Hope to see you on these dates!



Address Service Requested

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