SCOTT A. WILLIAMS & ASSOCIATES, LPA
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# CLIENT CONNECTIONS

August, 2018

## From the Desk of Ray Casey, Esq.

Dear Clients and Friends:

What a whirlwind 2018 has been! It's hard to believe kids are back in school, the days are getting shorter, and the smell of autumn is in the air. Summer was an exciting time at the firm. From Annual Client Meetings, our education workshops, to now working through Client Update Programs, there is always something to keep us busy.

It was a pleasure to see so many of you at the Annual Client Meetings. Annual Client Meeting season is my favorite time of the year here. While incredibly busy, it is also very energizing to see all of our clients coming out to hear us speak and me being reminded of the trust and confidence each of you have placed in us. A sincere thank you to everyone who attended an Annual Client Meeting this year, especially those of you who brought friends or family with you!

This is certainly a period of growth and innovation at the firm and I am very excited to be a part of it. As I think about the many new services and programs we have been working on, I am reminded of our core values we talked about at the Annual Client Meetings.

> **Make a significant difference in the lives of our clients; Integrity over profit; Do what you say; Focus on what works; Empower through education; and Innovate without constraint**

The growth of our client family and the addition of new services means change is inevitable, but what will never change is our commitment to our core values. Rest assured, Scott, Jen, and I are committed to maintaining the strong culture of integrity and service that serves as the foundation of our firm.

Speaking of changes and new services, our new Client Care Program is off to a great start. I hope all of you had a chance to meet our new Client Care Coordinator, Kami Imes, at one of the Annual Client Meetings. Within a couple weeks of starting, Kami was already working closely with several client families. Be sure to read Kami's article in this edition of Client Connections!

Best regards,

Ray

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**February, 2018**

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## Welcome Kami Imes!

We are excited to introduce the newest member of our professional team, Kami Imes! Kami's official title is Client Care Coordinator. She holds a Master's degree in social work and has extensive experience in both the hospice and hospital environments.

Kami's primary responsibility will be assisting clients participating in the Client Care Program, but you will also see her helping out at Annual Client Meetings and Client Update Programs.

Please be sure to introduce yourself to Kami if you have the opportunity.

## Client Care Program Kick's Off


We are pleased to introduce our Client Care Program. As our client family continues to grow, the requests we receive for assistance become more diverse and are ever changing. Many times we are the first people clients turn to for help when a need arises.

We are often asked to help a client locate services that will allow them to maintain their independence at home, check in on our older clients who have no family in the area or assist with a number of other challenges.

We have developed the Client Care Program to empower our clients and their families with the flexibility and support they need to maintain control of their care planning. For some clients, it may be a one-time need such as finding the right assisted living or rehabilitation facility and for others there may be an ongoing need for support. The Client Care Program is customizable to each client and family.

The Client Care Program is a collaborative process that begins with a Family Meeting. At this meeting, we will have the opportunity to meet with you and your family to assess the situation and discuss how we can best assist you. Please call the office for more information.

## Did You Know?

The Next of Kin (N.O.K) program, through the Ohio Bureau of Motor Vehicles (BMV), allows Ohioans the free option of adding emergency contact information to your Ohio License/State ID. If you are ever in an accident that leaves you unable to communicate, law enforcement can access this secure database to notify the person you have chosen to be contacted.

This can greatly reduce the amount of time it takes law enforcement to get in touch with your family in the case of an emergency when time may be crucial. Once you have entered the N.O.K. information, you may change or remove it at any time. In order to update your N.O.K. records, you can complete the form online, in person, or mail it in. Please visit: http://bmv.ohio.gov/dl-other-next-kin.aspx for more information.

# Summer Education Program Update

An important and essential core value of our firm is to empower our clients and their helpers through education. As part of our LifeDesign Legal Services™ maintenance program, we use the summer months to provide educational opportunities to our clients on a variety of topics.

**Guest presenters from Hope Behavioral Health at our recent workshop "Grieving: Finding a New Normal"**

Many clients brought their helpers to the What to Do™ Workshop so their helpers were able to learn about what to do at the right time during a disability or death. This training has proven to empower our client's helpers to experience a smoother settlement process.

The Back to Basics™ Workshop was attended by many of our clients wanted a refresher of the mechanics of their estate plan.

One component of our firm's mission is to do what we can to not only assist with a client's legal affairs, but also to help families deal with the emotional side of disability and death. In order to do this, we partner with professionals, such as Hope Behavioral Health, a counseling agency with multiple offices in Northeast Ohio, to refer our clients to if needed. Hope Behavioral Health provided education on Grief – "Finding a New Normal." Clients were engaged and walked away with many resources available to them.

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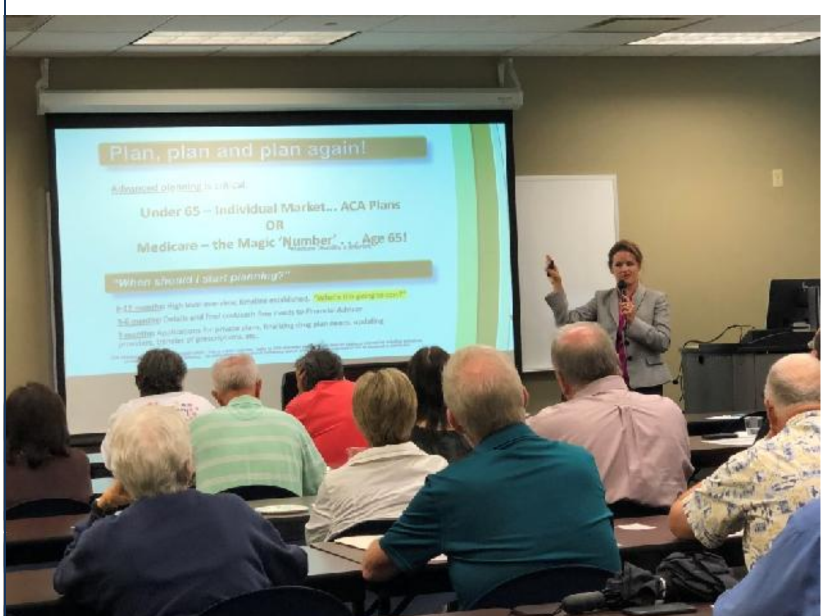



**Guest presenter Kelly Walter**

Another guest presenter was Kelly Walter. She provided an educational seminar that discussed ways to navigate through Medicare Health Insurance Options.

Client feedback from the various workshops has been overwhelmingly positive. We will continue to provide timely and informative education programs. Our next program will be on Funeral Planning on Wednesday, September 26th.

## How Your Documents are Updated:

**By Scott A. Williams, Esq.**

At one of our recent Client Update Programs, one of our clients asked me about the process of updating the legal language in our trusts. It was a good question because the entire process is "behind the scenes" so I thought I would provide a concise overview.

As you know, our firm is a member of the National Network of Estate Planning Attorneys. This organization provides us with a number of valuable resources, not the least of which is our software. Throughout the year, attorneys in the Network will submit suggestions for areas in our "master trust" where an improvement could be made. Sometimes these are legal or tax related, and other times they come from some specific experience that attorney had in their own practice.

Throughout the year, the Network has a volunteer group of attorneys who comprise the Document Review Committee. Their role is to maintain the boilerplate tax provisions in the trust. Sometimes, they are adjusting the document to changes in the tax laws, while other times they are developing new provisions which better utilize the existing tax laws to our client's benefit.

NATIONAL NETWORK OF ESTATE PLANNING ATTORNEYS

In the spring of each year, the proposed language changes are circulated amongst all of the law firms that comprise the National Network of Estate Planning Attorneys for comments, revisions, or other suggestions. The Document Review Committee reconciles that input and releases the final version of the legal language updates in the summer.

Additionally, Ray, Jen, and I, also monitor changes in Ohio laws from a variety of different legal and tax reporting services and often will develop state specific language into our "master trust." We also monitor national estate planning publications to identify trends occurring in other states and then identify strategies to stay ahead of any troublesome trends. We supplement this information by collectively attending in excess of 150 hours of Continuing Legal Education each year.

In the early spring of each year, we review each client's permanent file, as well as the legal provisions in their legal documents, to ascertain whether any client specific issues need to be addressed. We then compile the Estate Planning Review Worksheets you receive every other year at the Annual Client Meetings for review.

We then review each Estate Planning Review Worksheet, move any changes forward requested by a client and we add in the new tax or legal provisions into each client's trust. The entire process takes between and one and two hours per client.

Once we get closer to the date of a Client Update Program, Pat prints all of the updated documents for that week's Client Update Programs. This too is no easy process as signature pages need to be printed in duplicate, signing books assembled for each update program, witnesses and notaries assigned for each document, confirmation of which clients are attending which program, DocuBank® notified when a client updates health care documents, file copies inserted in each client file, and so forth. A typical week will usually involve 4 to 5 Client Update Programs. Thus we update between 80 to 100 estate plans in each week during update season.

From time to time, we may run across a situation where we feel we need to meet with a client one-on-one and we then schedule a number of private counseling and update programs to address those specific issues.

As you can tell, this is a highly organized process that leaves no room for error. It's a fine tuned system that only works due to the tireless efforts of our professional team members and a commitment for timely participation from each of you!

## DocuBank® Expands Services:


We have recently received notice from DocuBank® of a new service they are rolling out called "My MEDICAL SNAPSHOT."

This new feature lets you share your important medical story with ERs, hospitals and doctors when they ask for it (and they will). The critical medical information you can share includes your Surgeries & Hospitalizations, Medical Conditions and History, Allergies, Family History and a full list of Specialists, in addition to the Medication List they already offer.

It seems clear that the more medical information doctors have about us, the better the care we have an opportunity to receive. The My MEDICAL SNAPSHOT tool may be especially helpful for the many of us (and our family members!) who find it challenging to remember our entire medical story.

We will provide more information on this new service at our Annual Client Meetings next spring.

## Client Advisory Board Update


As most of you know, our Client Advisory Board is a group of clients who volunteer their time to meet twice a year to discuss ways we can improve our existing client services, new services we should consider implementing, as well as advice and counsel regarding the direction of our firm.

For those clients serving on the Client Advisory Board, please mark your calendars for Monday, October 22nd, from 1:00 to 4:00 for our final meeting of the year. We will be exploring several new technology related tools we are considering offering our client family, as well as soliciting feedback from this year's programs.

# Four Coping Strategies for Care Givers

**By Kami Imes, MSW, LSW.**

Many of us at some point in our lives will take on the role of caregiver for a family member or friend. Caregiving is often rewarding, but at the same time demanding and stressful.

Caregivers often become fatigued or experience what is referred to as "caregiver burnout". Caregiving can trigger many emotions. You may feel guilt, ambivalence, anger, frustration, and loneliness among many other things. It's important to recognize that although a range of emotions is normal, studies consistently show higher rates of depression for those in a caregiving role.

Some common signs of clinical depression include feelings of hopelessness, loss of energy, loss of pleasure in activities, significant changes in sleep and eating patterns and difficulty concentrating. Be aware of these signs and symptoms of clinical depression and seek professional help if you feel these symptoms are significant and persistent in your life.

There are strategies you can implement to assist you in coping with the challenges and changes in your life:

1. Ask for help. Allow those close to you to assist. Be realistic about your limitations and open in sharing your concerns with family and friends.

2. Make time for yourself. It's important to maintain your identity and continue participating in activities you enjoy. Ask yourself the question "What is one small thing I will do today that is just for me?"

3. Take time to exercise and eat a healthy diet. Even one short walk can make a difference!

4. Find a local caregiving support group. Sharing your experience with others in the same position can be valuable and validating.

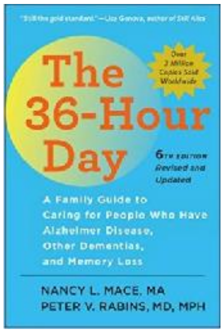
These groups are often available through local hospitals, churches and non-profit organizations which are disease specific such as the Alzheimer's Association or The Gathering Place for those touched by cancer.

**The best time to investigate additional resources for assistance is before there is a crisis. There are many options available to ease the burden of caregiving. Our Client Care Program can assist you and your family in navigating care decisions.**

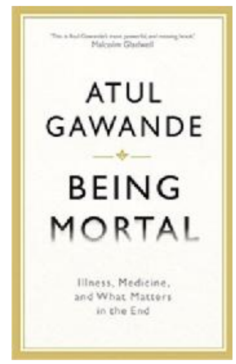
**Please call the office for more information.**

# Dementia and Alzheimer's Recommended Readings

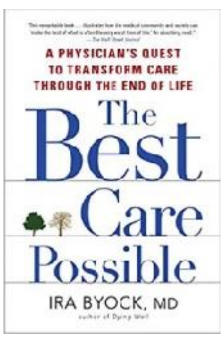
Our office has been fortunate to have been trained by Amy Florian, owner of Corgenius, on how to support our clients through times of grief, loss, and transition. Amy recently sent us this updated recommended reading list of outstanding resources for families and caregivers impacted by dementia and Alzheimer's. The summaries of each book are from Amy.



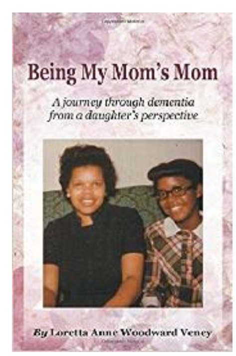

**The 36-Hour Day – Peter Mace and Nancy Rabins**. This is a comprehensive guide to all things related to caring for a family member with dementia, whether they are in the home or in a facility (along with ways to help choose that facility). The authors educate about the disease itself and cover even the most uncomfortable aspects of losing capacity. I recommend it for any family affected by dementia.



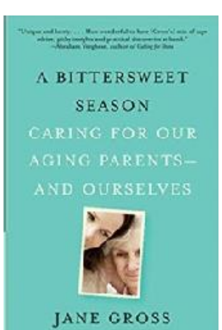

**Being Mortal – Atul Gawande.** This respected physician faces the reluctance he and other doctors have when presenting bad news to seriously ill patients. He honestly discusses the difficulty of making treatment decisions for family members, and how we all can do a better job of minimizing unnecessary pain and suffering during a person's last days.




**The Best Care Possible – Ira Byock**. This could be considered a companion book to Being Mortal. Writing from his perspective as a psychologist and a medical doctor, the author examines the attitudes and beliefs that drive end-of-life situations and the complexities of making treatment decision for those we love. These two books should be mandatory reading for anyone named as Healthcare Proxy/Power of Attorney.




**Being my Mom's Mom - Loretta Anne Woodward Veney**. The author chronicles her journey of caring for her mom after her dementia diagnosis. She addresses the challenges, but also includes a good dose of the humor and laughter that helped her cope. This is an informative, engaging book.




**A Bittersweet Season - Jane Gross.** The author transfers her skills as a NY Times reporter to the task of for caring for her aging mom. She bluntly and honestly addresses paying for it, the considerations and process of choosing a facility, making decisions as the situation worsens, the out-sized role that women play in caregiving, and the necessity to plan ahead.

# Chicken and Vegetables Recipe

This chicken, potato, and green bean recipe is one of Scott's favorites! The key to making this straightforward “Chicken and Vegetables” recipe not your average dinner is the briny olive-shallot dressing that you’ll spoon over top.

It’s worth seeking out Castelvetrano olives, a particularly salty variety of green olive that has been known to win over olive haters. If you can’t find them, Cerignola olives are a good stand in. Serve with a light, peppery red wine or a crisp, almost effervescent white.

**Ingredients**

1 pound baby red potatoes, halved (quartered if large)
6 tablespoons olive oil, divided
2½ teaspoons kosher salt, divided, plus more for cooking green beans
1½ teaspoon freshly ground black pepper, divided
4 6-oz. boneless, skinless chicken breasts
1½ teaspoons dried oregano
1 teaspoon lemon zest plus 2 Tbsp. fresh juice (from 1 lemon)
8 ounces trimmed green beans or haricots verts
½ cup pitted, chopped Castelvetrano olives
1 medium shallot, finely chopped

**Step 1**

Preheat oven to 400°F. Toss potatoes with 2 tablespoons oil, 1 teaspoon salt, and ½ teaspoon pepper on a rimmed baking sheet. Roast for 20 minutes.

**Step 2**

Toss chicken with oregano, lemon zest, 2 tablespoons oil, ½ teaspoon pepper, and remaining 1½ teaspoons salt. Remove sheet pan from oven and push potatoes to the side. Arrange chicken on other side and return to oven. Roast until chicken is cooked through, 20 to 25 minutes. Transfer to a cutting board; let rest for 5 minutes before slicing.

**Step 3**

Meanwhile, cook green beans in a pot of boiling salted water until bright green and crisp-tender, about 4 minutes.

**Step 4**

Mix olives, shallot, lemon juice, and remaining 2 tablespoons oil and ½ teaspoon pepper in a small bowl. Spoon the dressing over chicken. Serve with potatoes and green beans.