

If you didn't make it to our Annual Client Appreciation Seminar on November 26, 2011.. Here is a summary of what you missed...

We welcomed a NEW attorney to our office, Shawn Garner. Shawn is married to Brittany and they have four children, Gracie, Wesley, Molly and Noah. Mr. Garner is an avid sports fan and enjoys mountain biking and spending time with his family. "I enjoy helping people, that is why I'm excited about being a part of the Deason Law Firm", states Shawn.

Our philosophy at the Deason Law Firm is to provide our client with the best possible estate planning and legal services possible. Our attorneys and staff have a strong comprehensive knowledge of estate planning. We offer free consultations to all of our clients. We want to make sure clients understand their plans and have peace of mind. We are members of the American Academy of Estate Planning Attorneys. Why is this important? Glad you asked...The AAEPA is a premier national organization promoting excellence in Estate Planning by providing member attorneys with up-to-date research, educational materials and other important estate planning resources. The AAEPA association provides attorneys an important opportunity to meet others in the profession and discuss ways to better serve the needs of their clients.

Client Services

- ✓ Estate Planning (Living Trust)
- ✓ Funding
- ✓ Simple Estate Planning (I.e. Wills, Power of Attorney documents, HIPAA forms, etc.)
- ✓ Medicaid Planning
- ✓ Advanced Planning Strategies for Estate Tax Savings
- ✓ Business Succession Planning (Family Limited Partnerships, Limited Liability Companies, Incorporation of Companies)
- ✓ Trust Administration Services
- ✓ Probate Proceedings (including Ancillary Probates, Affidavits)

NEW Law

Arizona Trust Code ("ATC"). You won't hear me very often talking about what a good job the legislature has done, but in this case, they did an excellent job! The ATC is a very far-reaching law which deals with many different issues involving trusts. Before I talk about the benefits, I want to reassure you that the new law DID NOT, in any way, invalidate your estate planning. Your trust will still do exactly what it was intended to do.

Prior to the ATC, and in general, the kind of living trusts which most of our clients utilize has not been an "asset protection tool". It's still true that a person who creates a living trust will not get protection from creditors personally, the ATC now makes it possible for the inheritance of your spouse or children of any beneficiary you name to be protected from possible lawsuits, creditors, divorce, bankruptcies, etc., if the trust is drafted properly. It is easy to see why we are recommending that all clients whose documents were completed prior to passage of the ATC in 2009 make an appointment for a review and possible restatement of their trust. Documents written before the enactment of the ATC, do not take advantage of the provisions of the new law.



Deason Law Firm
Nov/Dec 2011

Holiday Greetings...

As the Holiday Season is upon us, we find ourselves reflecting on the past year and on those who have helped to shape our business in the most significant way. We value our relationship with you and look forward to working with you in the year to come. We wish you a very happy Holiday Season and a New Year filled with peace and prosperity.



Hope for the future - Do you have trusted advisors?

Hard economic times cause many to resort to money saving tactics that normally would never cross a person's mind. According to Consumer Sentinel Network complaint report for the Federal Trade Commissions, 7% of complaints for 2010 were about different scams. Seven percent doesn't seem like a large number but scam complaints were in the top 10 complaint categories for 2010 and represented 104,024 complaints.

A sad fact is that not all scam artists are unknown to the victim. Unfortunately in today's society family members have swindled their loved ones' assets right out from under them. Trusted caregivers have been documented to coerce someone to change estate planning documents, giving them authority to deplete the person's bank accounts and possessions.

A surefire way to protect yourself and your family is to stay in touch with your network of trusted advisors who have proven to many to be a financial and legal lifeboat.

We don't want our clients confused and unclear... in the past, many of our clients have expressed concerns and have had questions for us regarding their financial investments. That is why we at the Deason Law Firm, together with Misenhimer, Aivazian & Tennant, P.C. have joined forces to create Wealthcare Financial, which is a separate entity designed to provide total financial planning and services to our clients and others.

Set up a complimentary consultation with one of our advisors. You aren't obligated to use these services but it might provide peace of mind having someone take a look at your current investments and offer you advice based on your goals for the future.

Client Advisory Board Meetings

(For clients only)

Because we greatly value your opinions, we would like to invite you to join us from 11am-1pm on the last Friday of the month. If you are able to attend one of our lunch meetings, **please call Nancy at 783-4575.**

At this luncheon meeting we want to hear your feedback. Specifically, we want to hear what clients want, what information they need, and any area we may be able to improve or add to our services.

Here at the Deason Law Firm, we strive to provide absolutely the best possible care and service for our clients and their families. As a client, we hope you have seen and experienced this first-hand. These advisory board meetings are an opportunity for us to learn new ways to improve our practice.

Thank you in advance for your participation. Remember, please call Nancy today at 783-4575 to register.

Help US Help You

Review of your estate plan may be necessary...

How long has it been since we prepared your estate planning documents? I met with some clients last week and they hadn't been in for 15 years. Can you believe that? Remember that we recommend that our clients come in for a complimentary review every 3 years. It is important to sit down and review the following:

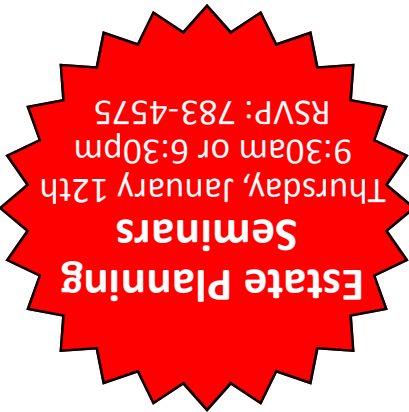
- ✓ Complete review of the distribution of your assets under your plan.
- ✓ Review to be sure all assets are properly titled to avoid Probate.
- ✓ Review of overall planning to reduce taxes.
- ✓ Review of your Health Care Power of Attorney and your Living Will.

Also, it's imperative that you keep your Power of Attorney documents up to date. Remember that these documents do not have to be honored. That is why we need to make sure that they are current and that they don't cause questions to arise for those to whom you are wanting to accept them.

Do you have Docubank? If you don't then you need to consider it. Call Nancy at 783-4575 and find out more.

At the Deason Law Firm, we are committed to building lifelong relationships with our clients and their families. We will work with you to customize your unique estate plan to protect, preserve and pass your legacy to your family and loved ones exactly how you desire. Estate Planning... It's What We Do!

This is a complimentary, educational newsletter. If you are NOT interested in receiving this information in the future, please contact Nancy at 783-4575.



PRESORT STANDARD
U.S. POSTAGE PAID
PERMIT 200
YUMA, AZ. 85364



Deason Law Firm
Estate Planning... It's What We Do!
242 W. 28th Street, Ste. A
Yuma, Arizona 85364
www.deasonlaw.com

