A MESSAGE FROM THE FIRM FOUNDER

Welcome, and congratulations on taking the time to learn about some very important matters!

Our complex and rapidly changing world makes estate planning more important than ever. Many people "don't know what they don't know" when it comes to estate planning. What you do or fail to do today will have lasting effects not only on your own health and wellbeing, but on your family as well. That is why we make education the launching point for estate planning.

The forces that affect your estate and how you want to pass on wealth often cannot be effectively managed through traditional estate planning strategies. What was a solution and standard of practice yesterday may no longer be adequate or appropriate today. The simple things that many people do out of the belief that they are a good substitution for an estate plan can lead to disappointment and family division. That is why we have created a new approach we call *Legacy Wealth Planning*. It is more powerful and flexible than traditional planning strategies and addresses the perils of modern times.

The webinar you are about to see is likely to change the way you think about estate planning, based on the comments from those who have attended our events in the last 27 years. But education alone will not get you from where you are now to where you want to be. You will need an **action plan** for that.

We make it easy for you to make an action plan – immediately and with no cost or obligation. Stick around till the end of the webinar, and you will have the opportunity to schedule a free Personal Consultation with one of our attorneys. We will help you determine what matters most to you and apply the discussion of the webinar topics to your personal situation. You can see whether *Legacy Wealth Planning* is a fit for you.

We have helped thousands set up estate plans since 1993, and guided hundreds of families through the estate settlement process. Visit our website at www.zimmerlawfirm.com to see what clients have to say about working with Zimmer Law Firm, or visit AVVO.com for more real life client experiences. On our website you can subscribe to our blog, learn about estate planning or upcoming law firm events, make a reservation for an upcoming event, or request a consultation. Visit our Facebook page for news and "like" us!

If you know someone who would benefit from what you learn from our webinar, you can leave their information in the post-webinar online survey, call us at 513.721.1513 (or toll-free at 1.866.799.4050), or contact us through our website. We will send them literature or invite them to an educational event with your compliments.

Thanks for joining us and enjoy the presentation!

Barry H. Zimmer
Founder, Zimmer Law Firm, LLC

ABOUT OUR LAWYERS

Barry Zimmer received the degree of Juris Doctor (J.D.) from the University of Cincinnati College of Law in 1979. He earned his undergraduate degree from UC, Phi Beta Kappa, in 1976.

After working for a firm and becoming partner in another firm, Barry founded Zimmer Law Firm in 1993 to practice exclusively in estate planning, estate settlement, Medicaid planning, and asset protection. Since then he has continuously worked to transform the process of estate planning to a friendly, understandable, and pleasing process for clients, and to offer the latest planning strategies.

Barry is a charter member of the American Academy of Estate Planning Attorneys (AAEPA), an exclusive national organization devoted to estate planning practice. The Academy delivers the latest education and practice assistance to members so that their clients experience outstanding service and results. He has served on the AAEPA Board of Governors, Education Advisory Board, and Document Language Committee. Since 2007 he has held the designation of Academy Fellow™ in recognition of his training, experience, and dedication to estate planning.

Barry is a member of the Cincinnati Bar Association, Ohio State Bar Association, American Bar Association, National Academy of Elder Law Attorneys, and the Ohio Academy of Elder Law Attorneys. He is a Continuing Education presenter for financial professionals and presented at the Ohio State Bar Association's 2014 Elder Law Institute, and the Cincinnati Bar Association's Elder Law educational program in 2017. ***See Barry's "why" he does what he does.***

Debbie Slaughter is an Associate Attorney and has been with the firm since February 2015. She concentrates her practice in Probate and Trust Administration, Irrevocable Medicaid Protection Trusts, and will-based planning. She graduated Magna Cum Laude from the College of Mount St. Joseph with a Bachelor of Arts in Paralegal Studies and a minor in Business Management. She earned her Juris Doctor from Chase College of Law in 2006. Debbie has more than 20 years' experience as a paralegal and lawyer in settling estates, and is a member of the Cincinnati Bar Association and the Ohio State Bar Association.

Debbie has taught for more than 20 years as an adjunct professor at her alma mater. She served as the Law Director in her hometown of Cheviot, Ohio where she was active in government and civic affairs for many years.

Debbie is married and has three children, two step-children, and ten grandchildren. When she has free time, she enjoys a great book, spending time with and supporting her grandchildren in their various activities, and being with family. She is a Cincinnati Reds fan and enjoys cheering on the home team at Great American Ball Park.

Matt Kisil is a graduate of The Ohio State University with Bachelor of Arts degrees in Political Science and Classics, both with honors. He earned his Juris Doctor degree from Case Western Reserve University School of Law in Cleveland, Ohio and his Master of Laws degree in Estate Planning from John Marshall Law School in Chicago. Matt was commissioned as an officer in the United States Army in 2011 and graduated from the Army's Judge Advocate General's Legal Center and School as a member of the Commandant's List (top 20% of the class).

Matt joined Zimmer Law Firm in 2017 to focus on estate planning and related matters. Previously, he worked with small businesses on forms of organization, advising on general business matters and succession planning, in addition to estate planning. He is accredited by the Department of Veterans Affairs to represent veterans and their family members. He is a member of the Cincinnati Bar Association, Ohio State Bar Association, and American Bar Association.

As an Army veteran, Matt was deployed to the Middle East in support of Operation Inherent Resolve. He currently holds the rank of Captain in the Ohio Army National Guard. He founded the Cleveland/Akron Chapter of the national Veterans service organization Team Red, White, and Blue, and participates in the Cincinnati Chapter. The mission of Team RWB is to enrich the lives of America's veterans by connecting them to their community through physical and social activity.

In his spare time, Matt enjoys exercise, reading, and playing sports, including ultimate frisbee, golf, basketball, and many others. Matt is an avid Cleveland sports fan and Cleveland native.

Matt Donald is of Counsel to Zimmer Law Firm. He acts as Co-Counsel in Medicaid and Veteran's Administration benefits cases. His expertise, teamed with that of our other lawyers, has enabled our firm to expand its services to meet the changing needs of its clientele as they age.

Matt became a lawyer after a 23-year career in the U.S. Army, retiring at the rank of Major. After a brief stint working at a law firm, he recognized the need in his community to help people secure nursing care as they aged, without going broke. He decided to strike out on his own and opened Donald Law Office in Baltimore, Ohio, which is southeast of Columbus.

Matt's focus is helping people secure Medicaid for nursing care costs, and Veterans' Administration benefits for those who are homebound or require nursing care. He shares the same core values that Zimmer Law Firm was built on.

Matt is a V.A. Accredited Attorney. He is a member of the Ohio, Columbus, and Fairfield County Bar Associations; the National Academy of Elder Law Attorneys (NAELA); and the Ohio chapter of NAELA. Matt is frequently sought to teach continuing legal education courses for attorneys, CPAs, and financial advisors.

WHY WE DO WHAT WE DO

We consider it a great privilege to help families plan their estate and leave a meaningful legacy. We understand that clients entrust us to make sure their worldly wealth is preserved, not only for their use but for generations to come.

We believe our work makes a real difference in our community – one family at a time. We do not see clients as just a means to do an estate plan – a one-off transaction. **Rather, we see an estate plan as the first step in a lifelong relationship with clients as a Trusted Advisor.**

We believe there is a gap in many families' estate plans because they are built on traditional planning strategies. They mainly address "after death" issues, leaving families vulnerable when the unexpected happens "during life." Nor do they address the impact that sudden, unearned wealth through an inheritance can have on ill-prepared heirs, or what happens to a financial legacy once it is received. In other words, how inherited wealth affects heirs, and what happens to inherited wealth after heirs receive it? To address these concerns, we created our *Legacy Wealth Planning* process with concepts developed by the American Academy of Estate Planning Attorneys.

Another shortcoming in traditional estate planning is an absence of family education and support. We recognize the importance of family education and involvement in making an estate plan work. That is why we created our "Trustee and Power of Attorney School". This unique class educates your future Trustees, Executors, and Power of Attorney agents about their responsibilities when the time comes for them to step in and manage or settle your estate. We include written guidance on estate settlement in every estate planning portfolio. To help you keep your estate plan in shape, we include a list of free support services for every living trust client, including trust reviews and phone calls/emails at no cost. Our latest client workshop aimed to help clients stay up to date and prepared for the unpredictable is "The 8 Most Common Mistakes People Make that Ruin an Estate Plan". It focuses on the importance of what you do after you create your estate plan. To that end we also include complimentary support services for every living trust client, including a free consultation after a client's death or incapacitation.

These services and more are to *Assure Peace of Mind* for our clients. That is our "Why".

Since 1993, I have helped thousands of people protect their families and their wealth. I have personally helped my own loved ones as they age, suffer through grave illnesses, and die. I am a husband and father and know the angst of thinking about the future of my family without me. I am also legal guardian for my special needs brother. I understand the emotional experience of estate planning.

I know firsthand the importance of good planning, and the disruption created by poor planning, or no planning at all. I get deep personal fulfillment from helping people plan for these issues. That is why I do what I do.

Barry Zimmer
Firm Founder of Zimmer Law Firm

AMERICAN ACADEMY OF ESTATE PLANNING ATTORNEYS

We are proud to be a member of the American Academy of Estate Planning Attorneys since its founding in 1993. We are the sole member in southwestern Ohio and have the second longest tenure of all Members. Following is a summary of what Academy membership means.

Focus on Estate Planning. Members of the Academy concentrate their law practice in estate planning. They make staying current with the latest and most effective tools and techniques a top priority. They are coached and trained on how to make the experience of estate planning as pleasant and easy as possible for clients.

Professional Legal Training. The Academy Education Department provides members ongoing training specific to the field of estate planning to ensure their legal knowledge and legal documents are based on the latest information and resources. The Academy requires members to have at least 36 hours of legal education in estate planning matters each year, which is three times the legal requirement in Ohio. There are monthly education calls and Summits twice a year when Members are trained by leaders in the industry.

Practice Support. Legal knowledge without an efficient and client-friendly law firm to support clients is not enough for a good estate planning experience. Each Academy Member works one-on-one with a Practice Building Consultant on the latest practice management strategies so that clients enjoy a transformational experience, unlike what they might have had before with a different law firm. Most recently, during the 2020 COVID 19 pandemic, the Academy helped Members convert their operations practically overnight so that team members could work from home and continue to help clients with their needs. Also, the Academy guided Members through the technology needed to support clients virtually and deliver online webinars.

Innovative Strategies for Growth. That our world changes at an exponential rate has become a *cliché* in recent years. The Academy provides visionary leadership for its Members to help them understand and serve the ever-changing needs of consumers and clients.

Collegiality and Sharing. One of the best benefits of Academy membership is the free and open sharing of ideas and experiences among members. That in combination with the other Academy advantages is an experience not available anywhere else to estate planning lawyers.

Selective Membership. Unlike other organizations, Academy membership is limited. Academy membership status means a lawyer has met certain criteria based on more than 27 years of experience with hundreds of successful and skilled lawyers.

Nationwide Membership. Members of the Academy are available throughout the U.S. This is important to clients who relocate to other states and/or own property in more than one state because Academy members are available to help in most states and many major metropolitan areas.

Coordination with Financial Professionals. Academy members recognize the importance of coordinating both your estate planning and financial goals. Members look to work as a team with your existing financial advisors.

Special Reports on Late-Breaking Estate Planning News. Regularly published alerts provide members with timely, accurate hot topics in estate planning such as the latest changes to our laws.