

# About the Zimmer Law Firm

## WHO IS ZIMMER LAW FIRM?



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## THE ZIMMER LAW FIRM “WHY”

- ❖ **What do we do?**
  - We are an estate planning law firm
  - We help people preserve and pass on their wealth
- ❖ **How do we do it?**
  - By starting with education about the need for planning
  - By identifying planning issues that are often ignored or overlooked
  - By delivering preeminent services in a process and experience unlike other firms
  - By developing relationships...not just legal documents
- ❖ **Why do we do what we do?**
  - Because protecting loved ones and wealth through life's transitions is essential to peace of mind
  - Because planning means *control over outcomes*...even in times of upheaval and crisis



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## Our core values...

- Lifelong relationships – *not just documents*
- Improve lives
- Hospitable experience
- Skilled, dedicated team
- Comprehensive planning
- Communications and updates



Our 27<sup>th</sup> year!



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## We are located everywhere...

- Office conveniently located in downtown Blue Ash
- Easy access
- Plenty of free parking
- Available by video conference where and when people need us



9825 Kenwood Road  
Downtown Blue Ash  
1 mile south of Pfeiffer Road



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# About the Zimmer Law Firm



**About Zimmer Law Firm**

- More than 4500 estate plans since founding in 1993
- Hundreds of estate settlements

Since 1993

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### Client Experiences....

We recently completed our estate plan with the Zimmer Law Firm. They were very patient with our questions and time frame and incredibly thorough with the process. We had a separate document we needed in a rush. They did so quickly and included the document fee in our overall cost. ... I highly recommend that you contact the Zimmer Law Firm.  
- Chris W.



\*Real client testimonial posted at [www.zimmerlawfirm.com](http://www.zimmerlawfirm.com)



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### Legal Department



Barry Zimmer, Founder  
Estate Planning,  
Medicaid Planning,  
Estate Administration



Debbie Slaughter, Attorney  
Estate Administration



Matt Kisil, Attorney  
Estate and Medicaid  
Planning



Matthew Donald, Attorney  
Of Counsel  
Medicaid Planning



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### Legal Department



Megan Brunner, Paralegal



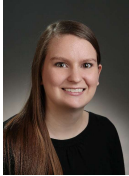
Ashley Maxey, Paralegal



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# About the Zimmer Law Firm

## Client Relations Department



Jamie Smith  
Marketing Director



Leah Pittman  
Event Coordinator



Beth Smith  
Client Relations Manager



Patty Johnson  
Bookkeeper



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## Client Experiences...

The staff members are always helpful and responsive. They have provided assistance with a variety of needs promptly and expertly. I highly recommend Barry and his team!

- Connie P.



\*Client testimonial posted at [www.zimmerlawfirm.com](http://www.zimmerlawfirm.com)



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## Our Valued Resource...



- Member, American Academy of Estate Planning Attorneys
- Since founding in 1993
- Education and practice management support
- Exclusive national organization of attorneys who focus on estate planning
- Only member in SW Ohio
- Academy Fellow™ Designation – B. Zimmer



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## For more about Zimmer Law Firm....

Click the link below to access our Webinar Home Page to access: :

- Attorney bios
- Message from the Founder
- The Zimmer Law “Why”
- About the American Academy of Estate Planning Attorneys

<https://zimmerlawfirm.com/pre-webinar-handouts/>

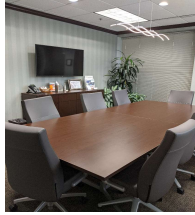


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# About the Zimmer Law Firm

## Client Experiences...

Our experience ... with the Zimmer Law firm was both completely comprehensive and enlightening. The staff was not only knowledgeable and efficient but delightful. I would be most confident and happy to recommend this firm to anyone.  
- Anita S.



\*Client testimonial posted at [www.zimmerlawfirm.com](http://www.zimmerlawfirm.com)



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## From AVVO.com...



**Exceptional Personal Service**  
Posted by AV  
April 23, 2019

We have been clients of the Zimmer Law Firm for over 15 years. And have found them to be informative and very helpful. Their latest client aid, a video, explains the trust and legal documents and [is] extremely helpful in reviewing what is in your documents in plain language.



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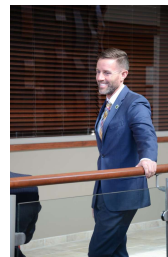
## PRESERVING NON-FINANCIAL LEGACY

- My Legacy – The Best Things in Life Aren't Things
- FREE with new trust plans
- Book to capture
  - Life's experiences
  - Personal histories
  - Advice to unborn
  - Words of wisdom
  - Family love letters
  - Pictures
- So you will be more than a name on a family tree to future generations



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## Client Experiences...



Excellent staff. You will be very comfortable working with Matt and his staff. They are very thorough. Highly recommend this firm.

- WLD



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# About the Zimmer Law Firm

## Client Experiences...

As always, the staff of Zimmer provided us a comprehensive review of our 3 yr. Trust review, changes based on new laws were incorporated as well as changes we requested. Matthew listened/discussed and made the changes, Megan was there as we signed the documents to explain in plain English what was in the documents and answer questions. All in all, a pleasant, thoughtful experience, confirmed we made right decision in coming to Zimmer.

-JMW

\*Client testimonial posted at [www.zimmerlawfirm.com](http://www.zimmerlawfirm.com)



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## From AVVO.com...



Peace of Mind  
Posted by Karen  
January 15, 2020

My husband recently passed away. We thought that we had all Estate plans in order, however, we didn't. Mr. Zimmer Helped me navigate through a very difficult time with kindness, compassion and support.



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## INCLUDED WITH NEW PLANS



- One-year of DocuBank
- On demand access in medical emergency to Health Care Power of Attorney, Living Will, HIPAA Release, medication list, family contacts
- Included in estate plans with trusts



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## Client experiences...

My wife and I decided to establish a trust for 'some day', not knowing she would die relatively young 2 years later. The work Zimmer Law Firm had done for us made the legal aspect of that dark period very smooth. If you want your will, trust, or the legal aspects of your estate planning done right, this group does it well. Very professional, very helpful, and friendly / easy to work with.  
- Jan T.



\*Client testimonial posted at [www.zimmerlawfirm.com](http://www.zimmerlawfirm.com)



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# About the Zimmer Law Firm

## Client Experiences...



Our experience was very positive and we are highly satisfied with our legacy plan. We particularly appreciate the comprehensive approach that Zimmer provides. Matt is very knowledgeable and had many helpful suggestions. Ashley was well organized and well prepared for meetings. We highly recommend Zimmer.

- WEM & KEM

