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INSIDE THIS ISSUE

- Oast & Hook Special Reports
- Announcement
- Oast & Hook
- Distribution of this Newsletter

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OAST & HOOK SPECIAL REPORTS

Over the past year Oast & Hook, working in conjunction with several distinguished colleagues throughout the country, has developed a series of Special Reports to assist our clients. The purpose of these reports is to identify some of the issues our clients may be facing and to educate them regarding some possible solutions. Whenever possible, it is a good idea for the client to review the appropriate reports prior to the initial consultation. If this is not possible, then Oast & Hook provides the report to the client at the initial consultation, so the client can review the report prior to the next meeting. All of our Special Reports are available for review and download on our website, www.oasthook.com. Our Special Reports are:

- **Estate and Financial Planning.** This Special Report discusses the need for clients to plan for the management of their personal affairs and property in the event of their disability and after their death. The Report also discusses the various planning tools that are available to assist clients in achieving their goals, as well as discusses the need for good investment planning.
- **Elder Law: Asset Protection Planning Explained.** This Special Report is designed to acquaint clients with achieving eligibility for public benefits to assist with the cost of long-term care.
- **Resolving Your Nursing Home's Medicaid Challenges.** This Special Report describes the Medicaid application process and the various challenges that Medicaid applicants face. The Report also includes several case studies illustrating these challenges and the possible solutions.
- **Estate Planning for Parents of Children with Disabilities.** Parents of children with disabilities face unique challenges. Children with disabilities are often unable to work, and they may need significant financial and emotional support for the rest of their lives. Many of these children will

be able to obtain public benefits, several of which are means-tested. This Report discusses issues and solutions in planning for children with disabilities.

- **Using Self-Settled Special Needs Trusts to Protect Public Benefits.** This Special Report discusses several situations in which those receiving means-tested public benefits may lose their eligibility for these benefits. These situations include receiving an inheritance, a personal injury settlement or award, and child support benefits. The Report includes case studies illustrating these situations and how using a self-settled special needs trust can help reserve eligibility for needs-based benefits.

- **Providing for Your Business.** This Special Report discusses the several forms of business entities, planning for the management of the business, and business succession planning. The Report includes several case studies illustrating business planning issues, and the possible solutions for those issues.

- **Providing for Your Grandchildren.** Grandparents often want to benefit their grandchildren, both during the grandparents' lifetimes, and after the grandparents' deaths. This Special Report discusses several options that are available to help grandparents achieve these goals, including college savings alternatives.

- **Providing for Your Pets.** Many families now want to provide for their pets as part of their estate and financial plan. This Special Report discusses several options available to clients who want to plan for their pets' care, including pet trusts.

- **What Blended Families Should Know About Estate Planning.** A blended family is a family in which one or both spouses have children from a previous marriage or relationship. This Special Report includes several case studies for different blended family challenges and some strategies that can be used to solve those challenges.

- **Vacation Area Homes.** If a client owns a home in a vacation area, then the client usually has significant tax and management issues to consider. This Special Report discusses these various tax and management issues and describes various strategies that can help resolve these issues.

- **The Benefits of Bloodline Trusts.** Many families face special challenges with respect to their children's choice of spouses. For example, some children and their spouses are physically and emotionally abusive, some are spendthrifts, and some have bad habits, such as drug addiction, alcoholism or gambling problems. Most parents want their hard-earned money to stay in the family on death, and they do not want the problem in-laws to get control of these assets. This Special Report provides information on using a bloodline trust to ensure that assets are kept within the family.

- **What You Should Know About Planned Giving.** This Special Report discusses planned giving as a means by which clients can achieve their charitable giving goals. The Report includes a discussion of the charitable income tax deduction and various planned giving techniques.

Announcement

Oast & Hook is please to announce that we have put our new television ads on our website. To view these new ads please visit our home page and follow the link.

Oast & Hook

Oast & Hook is an elder law firm. We represent older persons, disabled persons, their families, and their advocates. The practice of elder law includes estate planning, investment and insurance advice, estate and trust administration, powers of attorney, advance medical directives, titling of assets and designations of - beneficiaries, guardianships, conservatorships, and public entitlements such as Medicaid, Medicare, Social Security, and SSI, disability planning, income tax planning and preparation, bill paying, account management and reporting, care management, and fiduciary services. We also handle litigation involving these issues, such as will contests and estate administration disputes. For more information about Oast & Hook, please visit our website at www.oasthook.com.

Distribution of This Newsletter

Oast & Hook encourages you to share this newsletter with anyone who is interested in issues pertaining to the elderly, the disabled and their advocates. The information in this newsletter may be copied and distributed, without charge and without permission, but with appropriate citation to Oast & Hook, P.C. If you are interested in a free subscription to the *Elder Law News*, then please e-mail us at eln@oasthook.com, telephone us at 757-399-7506, or fax us at 757-397-1267.

Please visit us on the world wide web at:

www.oasthook.com

Our website contains information about Oast & Hook and an archive of our newsletters and other estate planning, estate administration, and elder law articles in searchable format.

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