



Benefits of Working with Roth Elder Law

- 1) **Attorney and CPA:** Fewer estates are subject to estate taxes because of the ever increasing estate tax exemption. Income taxes will have more of an impact on most estate plans. As both an attorney and CPA, Patrick can help you plan to minimize both estate and income taxes to pass more of your assets to your beneficiaries.
- 2) **Experience:** With more than 15 years of legal experience limited to Elder Law (including Medicaid), Estate Planning and Probate and Trust Administration, the attorneys at Roth Elder Law can help you design a complete estate plan and point out what common pitfalls you should be aware of to avoid.
- 3) **Planning Issues:** Roth Elder Law can help shed light on important estate planning issues you and your loved ones should know about. For example, we can help explain what happens to you and your family if you became disabled or need long term care (such as in a nursing home). Also, we can explain what your loved ones can expect to face after you pass away.
- 4) **Personalized Planning:** At Roth Elder Law we will listen to you and treat you in a friendly and professional manner, providing you with advice and counseling for your unique situation. We will work with you to provide intelligent, strategic, creative and practical options.
- 5) **Proven, Goal Oriented Process:** Roth Elder Law has developed a consistent process for our clients to ensure quality of service and responsiveness. We also pride ourselves in delivering our advice to you in an understandable way without a bunch of legalese. Our Planning Process is designed to help you identify your goals and create a unique plan that meets your individual needs. We do not use a “one size fits all” approach.
- 6) **Comprehensive:** When you select Roth Elder Law for your estate planning needs, we will deliver quality, customized, coordinated and all inclusive set of estate planning documents that will help you realize your planning goals.
- 7) **Implementation:** Simply signing your documents does not insure that everything will work out the way you hope. At Roth Elder Law we will provide you with detailed instructions to coordinate your plan and make sure your goals are met.
- 8) **Peace of Mind:** It is our goal to provide you with a comprehensive plan so that you can have peace of mind knowing you did all that you could for you and your loved ones in case of a crisis.

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