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PROPER PLANNING MAY CREATE PEACE OF MIND



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TIPS FOR ADVISING THE CLIENT

Thank you for allowing our firm to serve as an advisor to you and your clients. We appreciate your feedback about the impact the newsletters and our services have made on your law practices. Please continue to share with us legal issues that you encounter and we will address them in the newsletter.

This month's newsletter will be short as I am completing the arrangements for my and my fiancé's August 14 wedding.

Recently, I have received several telephone calls from trial attorneys across Florida asking me for guidance on how to advise their clients about the effect the settlement proceeds will have on the client's government assistance. As a professional courtesy, we are pleased to attach a sample letter that you can use in your practices.

Keep in mind we will attempt to achieve two goals here. The first goal is to provide value-added service to the client. Knowledge is power. In my experience, a satisfied client is one who is empowered to make informed, deliberate decisions that result in their

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peace of mind. Together, we can provide value added service through education. The second goal is born of the first goal and that is to continue our own educational process and avoid committing malpractice.

Again, we thank you for the opportunities you have presented us. We look forward to continuing to provide you with expert guidance and co-create solutions that fulfill your clients' needs.

UPCOMING EVENTS

Stephanie will be speaking:

September 16, Senior Connections, Minority Conference "Tools for Healthy Living." Pompano Beach.

October 5, Trial Lawyers CLE "Preserving the Personal Injury Settlement for the Aged and Disabled Client" at Upchurch & Watson, Maitland.

October 28, Veteran's Nursing Home "Advance Planning Documents." Pembroke Pines.

November 30, Certified Retirement Advisor Program Session 4 "Medicaid Planning." Orlando.

December 1, "Medical & Elder Law Issues in Florida" for Lorman Communications, Tallahassee.

Please call Hillary for more info.

ANNOUNCEMENTS:

Stephanie is the Former Chair of The Florida Bar Elder Law Section.

Our firm is a proud Business Patron of the AFTL Eagle Program.

"Many things are lost for want of asking"
—English Proverb

Ask about participating in our **Florida Bar Approved** Continuing Education Seminar at your office.

Meet The Staff

Flo Koplo, CLA

Guardianship	Probate
Trust Administration	Court Appointments

Kathy Russo, CLA

Special Needs Trusts	Medicaid & SSI
Nursing Home/ALF Resident Rights	Estate Planning

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