



**DOUGLAS
HAUN
HEIDEMANN** P.C.

QUARTERLY NEWSLETTER - SPRING 2017

Brown, Duncan named Rising Stars for fifth time

Douglas, Haun and Heidemann, P.C., attorneys Donald Brown and Nathan Duncan have been named Rising Stars by the Missouri and Kansas Super Lawyers Magazine. This is the fifth year the duo has been recognized by the publication.

This honor is awarded to no more than 2.5 percent of lawyers in the state. In order to qualify for the prestigious award, attorneys must go through several selection processes as well as be in practice for no more than 10 years and be 40 or younger.

Brown joined DHH in 2005 and was named partner in 2009. He specializes in the areas of estate planning, probate and trust litigation, consumer law, real estate law, debtors' rights, municipal law, banking law and general litigation.



Above - Douglas, Haun & Heidemann, PC attorneys Donald Brown and Nathan Duncan

Duncan was named a partner at Douglas, Haun & Heidemann in 2013. He has been an associate at the law firm since 2007, specializing in the areas of personal injury, civil rights litigation, employment law, and class actions.

5 Tips for Preparing For Your First Estate Planning Appointment

1 Come with questions. Most clients haven't been through situations to become familiar with estate planning concepts. Don't be ashamed that you don't understand what a trust is, how it works, who is in charge, etc. Many people believe a will is sufficient to avoid probate, which is not the case — a will merely directs the probate process. A good attorney understands that there are no "dumb" questions.

2 Think about the "what-ifs". Many clients come in ready to talk about how they want things to pass upon their death. However, many clients have not considered what they want to happen if a given beneficiary dies before them. Similarly, they may have considered who they want in charge of administering their trust or will, but they may not have contemplated who they want to administer them in the event their first choice can't do so.

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3 Get an idea of the ranges of fees other attorneys charge for estate planning. Knowing what various attorneys charge for estate planning will help you feel comfortable that your attorney's fees are fair and reasonable. The key, however, is ensuring you are comparing fees on an "apples to apples" basis. Comparing one attorney charging \$1,300-\$1,600 for a trust and a few collateral documents (powers of attorney, healthcare directives, and wills) with another attorney charging \$1,800-\$2,000 for those same documents plus comprehensive asset retitling documents is not a fair comparison. So make sure you understand what is included and what is not included in any ballpark pricing you obtain.

4 Find out about the background and experience of your attorney. It is important to carefully consider the background and experience of prospective attorneys. You want an attorney who has not only dealt with estate planning on the front end, but also ones who have dealt extensively with how estates are administered following death – both in probate and trust administration. Find out what you can about your attorney prior to your first appointment and be sure to ask your attorney about how much of their practice relates to estate planning, how long they've been doing it, etc. A knowledgeable and experienced estate

planning attorney should be able to answer all of your questions clearly and discuss multiple options for your consideration.

5 Bring your asset documentation. Most of my clients don't think to bring their asset documentation to their initial appointment. This isn't a problem from my perspective because we can get this documentation following our initial meeting as needed. However, having it from the beginning can allow your attorney to move things forward more quickly. In terms of what documents to bring, I would recommend bringing copies of deeds, bank and investment account statements, titles, corporation or other entity formation documents, and life insurance declarations page, along with a change of beneficiary form from your life insurance agent. Not all attorneys will handle your asset retitling and documentation in conjunction with your estate planning, but if they don't – they should. That's the best way to ensure all asset titling updates are done correctly.

If you follow these 5 tips you'll be well prepared for your first estate planning appointment. This will ensure a more productive initial meeting as you start down the path of estate planning for your loved ones.

Legal advice from the attorneys you trust

Did you know each month the team at Douglas, Haun and Heidemann shares valuable advice like this column on its website? Visit www.dhhlawfirm.com/blog/ for articles on topics ranging from estate planning to family law.

