



# Trust and Estate Planning News and Updates

The Good News, Updates, and Important Information From Your Friends at **Unruh, Turner, Burke & Frees.**

[utbf.com/trust-estate](http://utbf.com/trust-estate) | [paestateplanners.com](http://paestateplanners.com) | [paelderlawsolutions.com](http://paelderlawsolutions.com)

## HOW CAN I SIGN OR UPDATE MY WILL AND MAINTAIN CORONAVIRUS DISTANCING? By: Douglas L. Kaune

Many of you are still at home during the coronavirus outbreak and now may have the rare opportunity to devote time to updating your will and estate planning. This crisis has reminded us all of our fragility and the need to have a solid plan in place.



But I am sure some of you are wondering how you can get a new will prepared, signed and witnessed during these trying times.

Our team is working full time and has a process in place to make sure you are able to update your will and estate planning, while not having to leave the safety and comfort of your own home. We are committed to making this process as easy as possible for you.



The first step is to call the office at (610) 933-8069. Our staff will schedule you for an initial conference by phone or video conference and simultaneously send you an estate planning questionnaire to be completed and returned for review prior to your appointment.

*(See Page 3 for information on how we help you get your documents signed!)*

**PEOPLE AND PETS** | These days are challenging, and we expanded this section to bring a little lightness to your day! We welcome you to share a picture that means something to you. Thank you Mary Lou, Barbara and Amy for sharing your fun pictures! **To win a prize send your pictures to [lsnyder@utbf.com](mailto:lsnyder@utbf.com).**



Sonny



Delilah



Cuddly camel!



Maddie, Willard & Gracie

## SUMMER 2020

### HIGHLIGHTS IN THIS ISSUE

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Page 2 – Sign Up For Scam Alerts

Page 2 – Missing The Movie Theatre?! The Colonial Is Here For You!

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Page 4 – Helpful Tips to Navigate These Difficult Times

### SEE INSERT

**WE'VE ADDED NEW BENEFITS FOR CLIENTS – SEE THE INSERT TO GET ALL THE DETAILS.**



**BODHI IS ONE!**

Our office is located at 120 Gay Street, Phoenixville, PA 19460 | Tel (610) 933-8069  
Mail: PO Box 289, Phoenixville, PA 19460 Email: [lsnyder@utbf.com](mailto:lsnyder@utbf.com)

## BODHI'S FIRST HAIRCUT!



**SCAM ALERTS** | AARP has a really good resource page that we'd like to share, <http://bit.ly/UTBFAARPFraud>.

The Fraud Resource Center on the AARP website lists over 60 known scams and explains what to watch out for and how to respond if someone is trying to trick you. We have had several clients contact us with concerns recently. The scams increase during times of crisis and uncertainty, so protect yourself and sign up for email alerts so you are always one step ahead of the criminals.

It isn't mentioned on the site, but remember that if our office assists you with a deed, you may get a notice that looks official requesting payment for a copy of your deed. However, remember that we provide you with a copy of your deed, no need to pay a third party for another one!



**COMPLIMENTARY ATTORNEY CALL IN HOURS** | Have a quick question about your estate plan, elder law, being an executor or trustee, and/or changes in the estate or inheritance tax laws? We've set aside time on Thursday, August 27 as a bonus for our existing clients. This time is limited and is on a first come/first served basis.

**CLIENT BONUS CALL IN HOURS:**  
11 am to 12:30 pm.  
Dial 610-933-8069 to get your free call.  
This is an exclusive UTBF client benefit.

You will have up to ten minutes of free attorney time, but note that charges may apply if you need formal legal representation or help. You will never be charged unless you agree to the fee in advance.

## COLONIAL THEATRE ACTIVITIES | Are You Missing Movie Theatres (and POPCORN)?!

We hope to reschedule our estate planning panel discussion which was originally scheduled in April 2020. We do not yet have a date but are working closely with the Colonial and will let you know as soon as it's scheduled.

In the meantime, our friends at the Colonial have missed you and are excited to be open again. They have both in person and virtual offerings, check them out below and visit their website for tickets: [www.thecolonialtheatre.com](http://www.thecolonialtheatre.com).

**On-Demand Virtual Screenings** are available at [www.thecolonialtheatre.com](http://www.thecolonialtheatre.com). Titles have included *Up from the Streets: New Orleans the City of Music*; *The Booksellers*; and the celebrity-chef studded documentary, *Nothing Fancy: Diana Kennedy*.

**The First Ever Virtual Blobfest:** It's the 21st annual celebration of the Colonial's role in the 1958 sci-fi/horror classic, *The Blob*, starring Steven McQueen. Details for the July 10-12 virtual event: <https://bit.ly/ColonialBlobfest>

**Live Performances:** Tickets are on sale for fall and winter performances by The Room Live!, Two Funny Philly Guys, An Evening with Gaelic Storm, and The High Kings. Visit [www.thecolonialtheatre.com](http://www.thecolonialtheatre.com) for tickets.

The Colonial needs your support to ensure a successful re-opening. Arts and cultural organizations entertain, inspire, and inform - and are also essential economic catalysts. Patrons spend an average of over \$30 per person at surrounding local businesses with every visit. Ensure another century of film and live arts at the Colonial with a tax-deductible one-time or monthly recurring gift. Or become a sustaining Member! Or purchase a gift certificate for future use at [www.thecolonialtheatre.com](http://www.thecolonialtheatre.com). Contact Emily at [emily@thecolonialtheatre.com](mailto:emily@thecolonialtheatre.com) or (610) 917-1228.

## Will Updates (Cont'd from Page 1)

Following the initial appointment, we will prepare the documents to your specifications. We will send them to you so that we can discuss the provisions with you in detail during a second conference and make sure they reflect your wishes.

Because we are reviewing the updated documents virtually by phone or video conferencing in advance, the signing appointment is quick and easy.

Pennsylvania law is adapting to this crisis situation and is making virtual notary and witnessing a real possibility in the near future. By the time you read this, our firm may be approved to fully execute documents during a virtual appointment.



If you are unable to leave your home, we will provide you with the steps needed to sign a legally binding will right in your own home. Once your estate planning documents are signed, you will send everything back to our office for processing. The original will is ultimately returned to you for safekeeping.

We are currently offering “parking lot signings” at the Phoenixville office which allows for social distancing and a quick solution to get your documents signed, witnessed and notarized. As the summer days get hot and humid, we may move the signings to the front porch or to our conference room. If you look closely at the picture below, you should be able to see the clear plastic shield at the center of the conference room table. To protect clients and staff, we will be following the CDC guidelines and require anyone entering the building to wear a mask and to use hand sanitizer. We have adequate supplies of hand sanitizer and a restroom right off the conference room to wash your hands as well.

We will be spacing out meetings to allow time for the room to be sanitized between clients.

You do not have to let social distancing keep you from updating your will and other estate planning documents. You will continue to get all of our expertise and white glove treatment, possibly without having to come inside the office.

We want you to know we are here for you during this difficult time. Please call our office at 610-933-8069 for an appointment or if you have any questions.



## KEEP IN TOUCH! CLIENT CONTACT INFORMATION UPDATES ARE IMPORTANT

First of all, if you have moved locally or out of state, CONGRATULATIONS on your new home! We would like to be able to reach you in a timely manner. Please take a few minutes to contact our office by phone 610-933-8069 or Lisa Snyder by email, [lsnyder@utbf.com](mailto:lsnyder@utbf.com), to give us your updated address, phone and email information.



Keep in mind that if you are no longer a PA resident, it's advisable to meet with a local attorney to determine if it's beneficial to update your documents to the laws of your new state of residence.

If you have already updated your documents in a new state, please let us know that as well so we can archive your revoked documents. This will help minimize any possible confusion in the future about which documents are legally binding. **We really appreciate your attention to this matter.**

**This publication is intended to educate the general public about estate and trust planning. It is not intended to be legal advice. Every case is different. Before acting on any of this information, please seek and retain an attorney.**

## HELPFUL TIPS TO NAVIGATE THIS PERIOD OF SOCIAL/PHYSICAL DISTANCING |

Our Trust, Estate & Wealth Preservation team sends our best wishes to everyone during these unprecedented times. We have compiled a list of services and tools to help you and your family while we continue to isolate and practice social/physical distancing. Here is the link to the full article: <https://bit.ly/UTBFHelp>.

This list includes links to access grocery delivery that you might not have thought of before, restaurant take out ideas and opportunities to participate in one of the local CSAs or Farmer's Markets. Cook like a farm to table chef: We found a great website with 50 farmer's market recipe ideas <https://bit.ly/UTBFCSA>.

As the state turns green, please continue to use caution, wash your hands, and wear a mask!



## CONNECTING WITH US |

We have started a **Private Client Group** on Facebook and would love for you to join us! Here is the link: <https://bit.ly/UTBFPCG>

### Our UTBF Trust and Estates Facebook Page:

@UTBFTrustEstates We keep you up to date with links to our latest newsletters, info on holiday or emergency closures, etc.

# **NEW, COMPLIMENTARY, AND ABSOLUTELY FREE CLIENT BENEFITS ANNOUNCEMENT THAT YOU JUST CAN'T IGNORE**

**We Want To Say Thank You and Reward You For Your Loyalty And For Choosing UTBF,**

**David Frees, and Douglas Kaune As Your Estate Planning, Estate, Trust Or Elder Law Advisers**

The Trusts and Estates and Elder Law sections of UTBF would like to announce the implementation of the new UTBF Secure Client Portal that will be available for all new and existing clients.

From now on, new estate planning clients (doing wills, trusts and elder law planning) and our executors and trustees alike, will be given a free/high security and individualized Secure Client Portal. If you're an existing client, you will be given a portal the next time you come in to update documents such as wills, powers of attorney, living wills, IRA/401k trusts and other revocable and irrevocable trusts.

Your individual Client Portal will allow for the transfer and storage of private and sensitive documents between attorney and client safely, confidentially and conveniently. It can also act as a safe repository of your important legal documents (we'll load them for you) as well as your other documents such as deeds, car titles and memos to your children, spouse, heirs and executors/trustees. We can help you load them yourself...it's that easy.

## **Some Benefits For Estate Planning & Elder Law Clients:**

- **You can receive electronic draft documents from us for easy online review prior to signing. If your review appointment is by Zoom, you will also see the documents on the screen clause by clause as the attorney reviews them with you.**
- **You will also receive a secure copy of your finalized and signed documents which can be easily reviewed, downloaded, printed and forwarded.**
- **You can also give access to a spouse, agent under a power of attorney, child or others while you are alive, or at death.**
- **Your own folder in the portal can be used to upload planning notes, memos to executors, trustees and beneficiaries, deeds and other important documents and information as well as the contact numbers for your lawyers, accountant, financial and insurance advisers so they are all safely in one organized and secure location if something happens.**
- **The portal will also allow you to send private and confidential information to your attorneys safely and securely.**

## **Some Benefits For Executors, Trustees and Estate & Trust Administration Clients:**

- **You'll be able to easily and securely provide our office with a decedent's financial information and social security number without worry or the dangers of unsecured/unencrypted email.**
- **You can also provide beneficiary addresses and social security numbers electronically in a secure fashion.**
- **The portal will also allow you to receive inheritance and estate tax returns for review and storage in case there is ever a question later.**
- **You'll also be able to receive and store tax identification numbers, account valuations and appraisals from our office or from other advisers.**
- **This allows you to store all estate administration documents in a secure place that can be easily accessed and best of all, where it takes up no additional space in your filing cabinet, basement or attic.**

We are expecting the UTBF Secure Portal to be a truly transformative way for us to interact with you, and for you to store and to retrieve important documents. We want this to be something that enhances your UTBF client experience, so please provide us with your feedback as you have the opportunity to interact with the UTBF attorneys and staff via the Secure Portal program.

#### **What Do You Need To Do Next?**

If you're a new client, this will be established for you, and at no additional cost, as part of your program. If you're an existing client, please call to set up your revisions and updates (especially if your changes were done before the SECURE Act in 2019).

When existing clients order new documents, trusts, or updates of existing documents, your portal will automatically be created.

**To do new planning, or to update your existing plan and to receive your complimentary secure UTBF Client Portal, just call 610.933.8069 for an appointment.**

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## **ENJOY MORE SUMMER ENTERTAINING, RECIPES, AND COCKTAIL IDEAS FROM THE UTBF TRUSTS, ESTATES AND WEALTH PRESERVATION**

After a very long and unprecedented period of shutdown and quarantine, we hope that everyone is ready to have a safe and fun summer.

As our way of helping, we have put together some more summer entertainment and recipe ideas (at <http://bit.ly/UTBFBBQ>). We've included Dave's super-secret barbeque sauce recipe, and some fun cocktails, among many other ideas.

Please watch our social media and our blog for summer food, wine and related updates.

### **CONNECT WITH US:**

**Private Client Group on Facebook:** Join us! <https://bit.ly/UTBFPCG>

**UTBF Trust and Estates Facebook Page:** [@UTBFTrustEstates](#)