

**Robert Jones Law PLLC**  
Attorney at Law  
Estate & Trust Specialist

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June 2018

## ESTATE PLANNING AND PROBATE NEWS

### New Scottsdale Location

When the owners of our former location sold their building, I was able to move the main office to the building located fifty feet south. Our new address, effective immediately, is:

8171 East Indian Bend Road, Suite 101  
Scottsdale, Arizona 85250

Our telephone number remains the same, (480) 832-2000, and our email address is [attorneyrobertjones@gmail.com](mailto:attorneyrobertjones@gmail.com).

Please update your records to reflect this change. You may want to put the last page of this newsletter, with the updated info and map, in your estate planning folder for future reference.

### Mesa Conferences

I made arrangements to meet clients in a conference room located at 3707 E. Southern Ave., Mesa, AZ 85206, on the southeast corner of Val Vista drive and Southern Ave. Existing clients may call me with questions that I may be able to answer on the phone at no charge.

### Estate Planning, Three Big Questions

Just like cleaning the garage, many of us are very content to procrastinate when it comes to completing our estate plans. Like the garage, we may be overwhelmed and need a nudge to get started. It is the same with estate planning. Your first step is to understand three main concept questions: Important People, Property and Assets, and Future Plans -- and how they relate to your unique circumstances.

#### Important People:

This should be rather straightforward: identify the most important people in your life. Consider yourself, spouse, children, grandchildren, and other family members. You may wish to consider charities, schools or faith organizations that are important to you. Take the time to consider the positive impact that others have had on your life. Any pets? Start making that list and take notes, if helpful. This is where the planning process really starts.

### Property and Assets:

Think about your assets in general, and a ballpark value. Start by creating a list of the assets you own or control. Do not worry about the account numbers or dollar values. All you need is a rough estimate of what you have.

For example, cash, stocks, bonds and real estate, retirement accounts, along with approximate values. You might also note whether you own an asset in joint tenancy with someone else, or as separate property. It is helpful to identify any wills, trust agreements, life insurance, business interests and significant inheritances you may receive.

### Future Plans:

Next, think generally about the plans you want to make for the people on your list (including yourself) and what should be done with your assets if you become incapacitated or at your death. I can help to guide you in this process. Here are some important questions to consider:

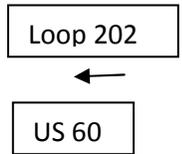
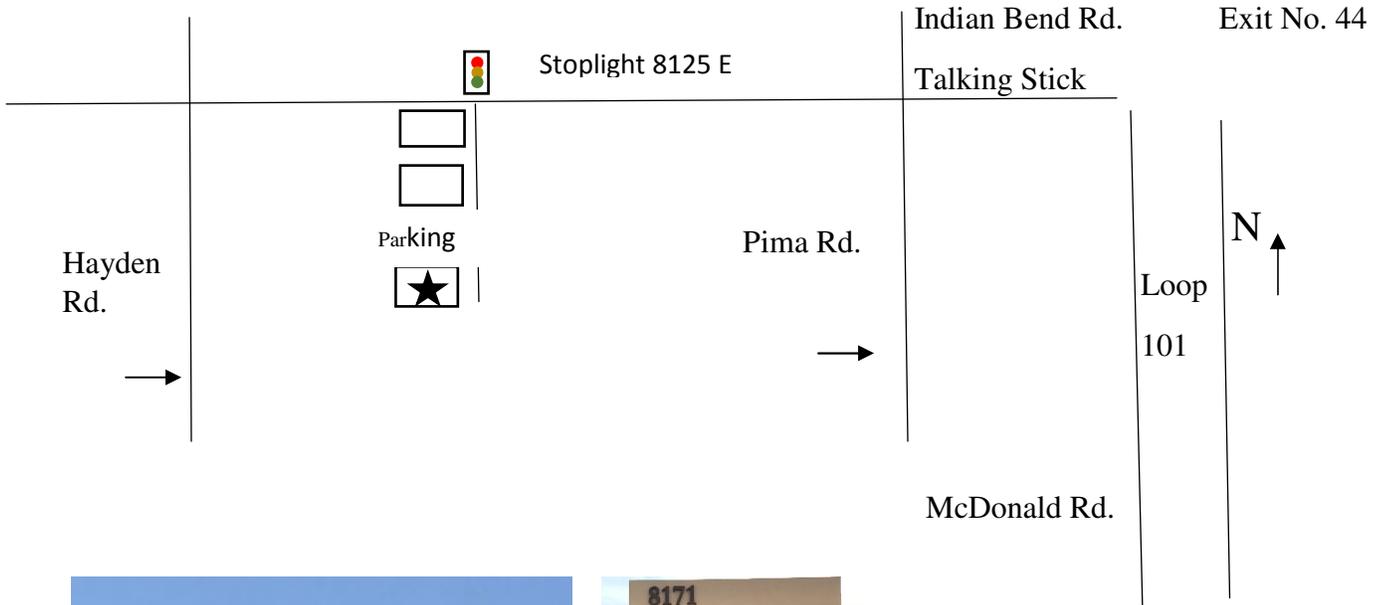
- Who is your choice to make personal, health care and financial decisions if you become incapacitated due to injury, illness or old age?
- How do you want your assets distributed to your loved ones and charities?
- Do you need to provide for someone in your family with special needs?
- Do you wish to protect the inheritance *from* some of your loved ones, as well as *for* them?

It is true that squandering, divorce, lawsuits and even bankruptcies have devoured many inheritances. Careful planning can help make sure that an inheritance is a blessing and not a curse. We can plan for the potential disasters. You may contact me for assistance with these issues.

- Do you want your estate to avoid or pass through probate? Do you know the difference?
- Do you need to consider estate, gift and income tax implications?
- Would you rather be a "voluntary philanthropist" versus an "involuntary philanthropist" when choosing which assets to benefit your favorite charities? Saving income tax is possible, by certain beneficiary designations.

This is a short list of the considerations you might address when approaching the estate planning process. In the end, developing answers to these questions will help you enjoy estate planning peace of mind. The garage can wait ... for now. You may contact me with questions concerning these issues.

8171 E. Indian Bend Road  
 Scottsdale, AZ 85250



When coming from Mesa take either U.S. 60 or Loop 202 and head north on Loop 101. Take Exit No. 44 Talking Stick/Indian Bend Road and turn left. Drive west past Pima Road, then turn left at the next stoplight, 8125 East. Then take the 2<sup>nd</sup> right and park in front of the office. The top of the building says “8171 Margrave Celmins P.C.”

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**AREAS OF PRACTICE:**

Robert W. Jones III is certified by the State Bar of Arizona, Board of Legal Specialization, as a Certified Specialist in Estate and Trust Law. We welcome client referrals for the following types of matters:

*Estate Planning* including trusts, wills, special needs trusts planning, probate avoidance, estate and income tax planning, trust decanting, asset protection, gift planning, and health and financial powers of attorney.

*Probate and Trust Matters* including large and small estates, informal and formal probate, trust administration, irrevocable trust termination or modifications and private family agreements.

*Litigation of Probate and Trust Matters* including will contests, family disagreements, and fiduciary malfeasance.

*Personal Injury Cases* in which a client is injured due to auto accident or other event.

*Real Estate Matters* relating to transfer of title to real property in a decedent's name, transfer of property to or from a client's trust, and satisfying title company requirements which arise upon sale of real estate.

*Business Planning* including Limited Liability Companies, Partnerships, and Corporations, also including minutes of annual and special meetings to preserve the status of the entity and succession planning.

We strive to keep your contact information accurate and current. Please let us know if you plan to change your mailing address. You may also provide us with your email address which for many, is a better way to stay in touch. And as always, I appreciate your referrals.