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Berwitz & DiTata LLP Introduces Its Trusted Family Advisor Program

Major lifetime events trigger changes in estate planning. Often our clients only think to call us at the sad times in their lives. When illness, incapacity or death of a family member occurs, our clients pick up the telephone to let us know so that we can assist them in handling the new issues - guardianship, probate or trust administration, asset protection and Medicaid planning. We are also remembered when a beneficiary, trustee or executor passes away. But we would like to celebrate the happy events with you, too. At the births of children and grandchildren you may want to provide in some special way for the newcomer. You may have questions about whether the addition of a family member changes the plan - or you may *want it to*. You may decide to purchase a new home or move from a large home to “more manageable” quarters. Children may marry - or divorce, your assets may undergo significant change (increase or decrease), you may inherit - or suffer business setbacks. We encourage our estate planning and Medicaid planning clients to advise us of these changes because plans need to be monitored periodically to accomplish the goals that have been established.

In order to better serve all of our clients and friends, we are initiating the “Trusted Family Advisor” (TFA) Program which we hope will make us more valuable to you. The TFA Program is simple. Just contact our firm any time you or a member of your family requires the services of an attorney - for any purpose. Pick up the telephone and give Berwitz & DiTata LLP a call. We hope that you will never need an attorney because of an injury, car accident, medical malpractice, employment dispute, divorce or Family Court matter, commercial or civil litigation, or landlord/tenant issue. However, while our practice does not include these types of law, we will refer you to an attorney who has expertise in the appropriate area and who can protect your rights. Of course, we will provide you with representation in any of the areas encompassed by our practice, elder law, guardianship, Medicaid planning and obtaining Medicaid benefits, estate and retirement distribution planning, and probate and trust administration, including contested matters.

It is our hope that you will take full advantage of the TFA Program and allow us to be your Trusted Family Advisor. We would welcome any thoughts or suggestions you might have to make this Program as helpful to you as possible. We always look forward to hearing from you.