

ELDER LAW REVIEW

JUNE 2014 Edition

Pluto Legal, PLLC offers FREE Educational Workshop on FARM SUCCESSION & 2014 TAX UPDATE

Pluto Legal, PLLC and Jorgensen Financial Services, have teamed up to present an educational workshop focusing on Estate Planning and transitioning the family farm to the next generation.

This workshop will cover:

- The basics and importance of Estate Planning;
- How often an Estate Plan should be reviewed;
- Tax law changes for 2014;
- The importance of planning for disability;
- Life Insurance and Annuity products that can help you plan for Long-Term Care;
- Question & Answer session.

The day will be beneficial for farming clients in any stage of their Estate Plan – from those without a plan to those still farming but considering retirement, to families with an established plan but have question about whether their plan is up-to-date with current laws or insurance and financial products.

Lisa Pluto, Leah Gilbert of Pluto Legal, PLLC and Marjean Ossefoort of Jorgensen Financial Services have valuable information that will be very helpful in your quest to complete your personal and farm estate plan.

This Farm Succession Workshop will be held **Wed., July 9** from **9:00 AM to 12:00 PM** at 1975 Selling Station in Ivanhoe, MN.

The same workshop will be presented again on **Wed., July 16** from **9:00 AM to 12:00 PM** at the Pipestone Country Club in Pipestone, MN.

Refreshments and lunch will be served.

The workshop is FREE; however, space is limited. To register for either workshop, please contact Beth at (507) 247-5900 or toll-free at (866) 457-3131, or email her at BDaniels@PlutoLegal.com.

The deadline to register for the Ivanhoe Workshop is July 6th; the deadline for the Pipestone Workshop is July 10th.

Pluto Legal PLLC offers NO cost, NO obligation consultations. This is a great opportunity to get informed of all the changes and options available for you, for all your Estate Planning and Medical Assistance Planning needs.

We have many educational workshops coming up, so please give us a call, toll free at 1-866-457-3131 or visit our website www.PlutoLegal.com to see when we will be in your area. **Like us on Facebook!**

The Elder Law Review is brought to you by Pluto Legal, PLLC. If you would like to be added or removed from our distribution list, please contact Juell Buchholz at our toll-free number 1-866-457-3131.

DISCLAIMER: The content of this newsletter should not be taken as legal advice or as an expression of the views of the firm, its attorneys or any of its clients. We hope that the content of this newsletter spurs discussion among your family members and helps your family through this challenging process. The author expressly reserves the right in the future to change the views expressed in this newsletter.

FARM SUCCESSION & TAX UPDATE WORKSHOP



The workshop covers:

- The estate planning process
- The goals you want to reach with your estate plan
- The importance of reviewing your estate plan
- 2014 Tax changes
- Gifting Issues
- Life Insurance and Annuity Products
- Long-Term Care Insurance basics

**Free
Workshop**

Date: Wednesday, July 9, 2014

Time: 9:00 AM to 12:00 PM
(refreshments and
lunch will be served)

Location: The 1975 Selling Station
2792 South Hwy 75
(intersection MN 19 & Hwy 75)
Ivanhoe, MN 56142

Registration Contact: Beth Daniels
Pluto Legal, PLLC
100 E. Hwy. 14
Tyler, MN 56178

Registration phone: 507-247-5900 or toll-free 1-866-457-3131

Wednesday, July 16, 2014

9:00 AM to 12:00 PM
(refreshments and
lunch will be served)

Pipestone Country Club
921 - 8th Ave SE
Pipestone, MN 56164

Presented by: Lisa K. Pluto, Leah R. Gilbert, and Marjean Ossefoort

Sponsored by: Pluto Legal, PLLC and Jorgensen Financial Services,

Workshop Date (mark 1): Wed. July 9 in Ivanhoe Wed. July 16 in Pipestone

Names of those attending: _____

Business Name: _____

Address: _____

City, State & Zip: _____

Phone: _____ **Email:** _____

Please pre-register by:

Ivanhoe: July 6th
Pipestone: July 10th

Send registrations to:

Pluto Legal, PLLC
100 E. Hwy. 14
Tyler, MN 56178
Fax: 507-247-5868

BDaniels@PlutoLegal.com