



In Practice  
**27**  
Years



## From the Desk of Kristen M. Jackson

Hope you had a wonderful and happy Easter. Since our last newsletter things have changed a bit around here. We moved back to the Regions office building where many of you first met us prior to 2004. The new offices offer newer advanced telephone technology and high speed fiber optics internet capability. To best represent our local, state, national and international clients and achieve the best results for them, we must constantly and innovatively change our computer, phone and internet technology. We believe you will enjoy visiting our new offices.

Another change to the firm is the addition of a newly registered trademark which was inspired by our clients. See how Jackson Law, P.A. views its relationship with its clients and what inspired the development of the trademark. The trademark will appear on all media published by the firm.

Many of you ask about my Sharpei puppies as there has not been a column published by either of them since last year. Well, they are back. In this issue Kiwi provides an update on her eye surgery and a bit about a day in a dog's life in the Jackson home.

Also there are a couple of articles tagged with our law alert icon which I believe will be of interest to those of you who do not already have a trust. For those who do, the importance of keeping your documents up to date is critical. If you have questions regarding updating your estate plan, please do not hesitate to contact our office. If you do not have estate planning currently in place, you should consider making an appointment with us.

We would like to thank all of our clients for their devotion to our firm over the years and as we enter our 27th year in practice, we look forward to a long and continued relationship.



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## OUR ORLANDO OFFICE HAS MOVED

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As of March 1st our Orlando offices moved to the 7 story Regions Bank Building at the corner of Kirkman Road and Vineland Road, diagonal to, and in sight of, Universal Studios Florida, and is approximately 2 blocks from our previous location on Major Blvd. Our offices are located on the 3rd floor, Suite 310. Clients that met us prior to 2004 will remember this location as it is where you first met us. The new office location provides us with advanced telephone and internet technology to better serve our clients, services that were not available at the Major location. Our phone numbers and our Lake Mary office address remain unchanged. We look forward to seeing you in our new offices.



## Together We Stand®

### Mission Statement

*To create a legal environment for our clients where legal representation is not about our lawyers and legal staff controlling and dictating the representative needs of our clients, but rather about joining forces with our clients by standing together to strengthen our ability to best represent our clients' interests and achieve for them and their families a positive result.*

Jackson Law, P.A., "Together We Stand"

Inspired by its clients, Jackson Law, P.A., introduces its new federally registered trademark that now represents the firm's mission statement.

During the past twenty seven years in practice, Jackson Law has met with more than 10,000 new clients and managed more than 30,000 new client matters. Throughout these years and our relationship building with you, our clients, the firm was enlightened to a more reliable and true understanding of the meaning of legal representation.

Whether implementing a family will, developing a new business, selling your home, filing for divorce, filing bankruptcy or requesting other legal representation, think of your lawyer as someone you would trust as your partner to accomplish your legal goals. Realize that it is through the collection of information you provide us, your team of lawyers, and the skills, knowledge and experience both you and your lawyer hold that enables and empowers us as a team to stand together to best represent and achieve your legal goals, in the best of times as well as the worst of times.

We would like to thank you, our clients, for permitting our firm throughout the years to stand together with you in your time of need and we look forward to a continued and long lasting relationship in the years to come.

## KEEPING YOUR ESTATE PLAN UP TO DATE

If your estate plan has been around for awhile, it probably needs to be updated. In some cases, entire plans need to be changed. Statistics indicate that up to 90% of older plans fail to accomplish what they were originally intended to do primarily because they have not been properly maintained over time. Maintaining an estate plan is as important as creating it in the first place! You should review your estate plan periodically to ensure it is still effective and accomplishes your original objectives.

Family situations often change during your lifetime. Marriages and divorces, births and adoptions, accidents and illness occur. Minor children become legal adults often making it necessary to change your estate plan provisions affecting them, and individuals previously named as estate plan agents or trustees may need to be changed.

Significant changes in amount and description of estate assets may occur or it may become necessary to form a legal entity, such as a corporation or limited liability company for a business. In addition, laws are always changing which can impact estate plans and place assets at risk. This is especially true this year since the estate tax laws have changed substantially for 2011 and are scheduled to do so again in 2013.

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## AREAS OF PRACTICE BY OUR TEAM OF ATTORNEYS

### ESTATE PLANNING

Wills, Trusts, Probate,  
Living Wills,  
Powers of Attorney

### ELDER LAW

Medicaid, Life Care Planning,  
Asset Protection  
Planning, Appeal

### BUSINESS & CORPORATE

Corporations, LLCs, LLP's,  
Partnerships, Contracts,  
Franchises, Trademarks,  
Start-Ups, Copyrights

### FAMILY LAW

Divorce, Pre-Nuptials,  
Child Custody, Adoption,  
Child Support

### BANKRUPTCY / FORECLOSURE

Chapter 7 Bankruptcy,  
Forbearance, Short Sale,  
Deed In Lieu Of

### REAL ESTATE LAW

Closings, Title Insurance,  
Sales & Purchases, Leases,  
Contract Review,  
Contract Preparation

### IMMIGRATION

Visas: Family, Marriage,  
Investor, Work,  
Employment, Green Cards,  
Citizenship, Asylum, Appeals,  
Cancellation of Removal

### LITIGATION

All Areas of Legal Practice,  
Contract Breach,  
Business Disputes, Torts,  
Corporation Dissolution

## OFFICE LOCATIONS Orlando & Lake Mary



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As the years pass, relationships and circumstances evolve so that plan provisions should evolve as well. Without regular plan reviews, unnecessary taxation, costly and stressful probate, court directed guardianship procedures, or government mandated estate administration could result in the demise of what once was a well thought out family legacy plan.

We can help by providing periodic reviews of your estate plan to ensure it remains current and your estate assets remain protected against certain risks such as unnecessary estate taxes and costly and stressful probate.



## FLEXIBILITY OF TRUSTS

Long, complicated wills have been losing popularity for years due to the need to probate them to accomplish their goals. In their place, men and women have been creating revocable living trusts to serve as the core of their estate plans. With a trust-based estate plan, directions for the care and management of the estate are set forth in a trust agreement. Tax-saving trust provisions can be incorporated into the trust agreement. However, often people fail to place everything in a trust so a pourover will accompanies the trust to direct that any money or property not placed in trust during the estate owner's lifetime is to be "poured over" into the trust following his or her death to be managed and distributed under the terms of the trust agreement.

While that means there may still be a probate estate, the costs of processing a small probate estate are usually low, and the possible advantages are significant. When there is a probate estate, for example, creditors or disgruntled heirs must present their claims within a specified time (30 to 90 days) or their claims are invalid. Without any probate proceeding, beneficiaries of estates transferred primarily by means of living trusts might be exposed to claims for up to years after the decedent's death.

Revocable living trusts offer a number of advantages. The chief estate planning advantage of a living trust is the way it can serve both present and future needs. You can set up a sound investment program that outlives you. Without interruption for probate, your living trust can continue as a source of income and support for your spouse, your children or other beneficiaries.

**Flexibility.** Paired with a simple pourover will, a living trust offers extraordinary planning flexibility. Like a will, the terms of the living trust agreement can be revised and updated as needed. You can adjust the services of your trustee as needs or circumstances change.

**Privacy.** When assets are transferred by will, anyone can look at the probated will and find out who received how much. The terms of a living trust agreement are not public at your death. As a result, the use of living trusts in estate planning keeps your estate arrangements private.

**Simplicity.** Estates often consist of stocks, bonds, savings, real estate and business interests, and sometimes valuable collections, pets, memorabilia and other special assets. Living trusts unify and simplify the estate management of estates. Life insurance proceeds can be made payable directly to the trust to be managed along with other assets for the beneficiaries designated by the trust.

If you have not already done so, you should

start your planning now. Estate planning is a highly personal matter. No two peoples' goals and circumstances are exactly alike. Contact us to assist you in implementing the right plan for you and your family.

## NUTMEG AND ME

by: Kiwi Jackson

For those of you who do not know me, I am Kiwi, Kris's youngest pup, 2 years old now. Many of you have asked Kris about my progress since my eye surgery last year. Well, like my sister Nutmeg, my surgery was successful and I can now enjoy the day without squinting and tears constantly pouring down my face. Yep, Kris took me to the small animal hospital at the University of Florida in Gainesville and the same doctor, Dr. Barry, who fixed Nutmeg's eyes, fixed my eyes too. She is a really nice doctor and heads the residency program for the University of Florida's veterinarian school. Now it's back to just being a great pup for Kris and a good sister to Nutmeg.

So what is a day in the life of Nutmeg and me like? Well, I'll tell ya. In the morning we generally begin by bolting up and down the fence lines of our yard chasing the squirrels and meeting neighbors for a morning visit. That is followed by a relaxing moment in the living room to a treat Kris gives us each morning called Greenies. Boy, are they good! Afterwards, I will generally start a game with Nutmeg called "chew face" where I jump on top of her and she and I will pretend to fight to see who is the stronger and faster. Clearly, I am faster but Nutmeg is stronger as she is 20 lbs bigger than me.

Then it is time for Kris to have breakfast at which time Nutmeg and I will sit and stare pitifully at her until she feels sorry for us as gives up a taste of her breakfast. The wrinkles in our faces win out every time. Kris is truly a softy. Following Kris's breakfast she will prepare breakfast for Nutmeg and me which following we will go outside and play until Kris leaves for the office. While indoors during the day waiting for Kris's return we guard the home and observe all of the weekly visitors to our home for care, maintenance and repairs such as the maid, lawn man, pool guy, gas man, and pest control, to name a few. Also, I will try to pull out every toy I own from my toy box and re-carpet the family room with toys and old bones before Kris returns home.

The next favorite moment comes when Kris comes home from the office. Sometimes she returns home a couple of times. Regardless of how many times she returns we smother her with jumping, squeals of joy and kisses. She says we remind her of excited little pigs and she will say "How are my Babes (you, know, like Babe the pig)?" Our evenings at home are very similar to morning, greeting neighbors home, chasing squirrels and lizards, running and more. My two favorite moments of our evenings are a walk with Kris around the neighborhood and chasing the laser light pointer Kris uses to wear down Nutmeg's and my energy.

Gotta go hide now as Kris is calling Nutmeg and me to come get a bath. Run Nutmeg, hide, Kris is coming! I hate baths.



Regardless of your legal needs, remember that the Jackson Law, PA is a **FULL SERVICE LAW FIRM** with a legal team ready to represent you for the majority of your legal needs.