



[Brennan & Rogers, PLLC](#)

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The Brennan & Rogers, PLLC Journal

Elder Law Updates

Using Estate Planning to Prepare for Medicaid

Careful planning in advance can help protect your estate for your spouse or children. If you make a plan before you need long-term care, you may have the luxury of distributing or protecting your assets in advance. This way, when you do need long-term care, you will quickly qualify for Medicaid benefits.



Understanding the Common Types of Trusts



A trust is a legal arrangement through which one person (or an institution, such as a bank or law firm), called a “trustee,” holds legal title to the property for another person, called a “beneficiary.” Trusts fall into two basic categories: testamentary and inter vivos.

Limited-Time Free Virtual Meet & Greet Sessions Continue in March and April

Reserve Your Free Virtual Meet & Greet Session with Smilie G. Rogers, Esq., or Mary Kathryn Brennan, Esq.



Allow us to introduce you to ourselves and the basic concepts surrounding estate planning. Learn more about Revocable Trusts (“Living Trusts”), Transfer on Death Deeds ([*aka TODD, which you can also read about in Smilie’s Blog*](#)), Advance Healthcare Directives, Powers of Attorney, Wills, and their importance under normal circumstances, but more so now during the pandemic.

**During a Virtual Meet & Greet, our lawyers cannot give specific legal answers or advice, and sessions shall not constitute the formation of an attorney-client relationship. Sessions last for thirty (30) minutes.*

Private Session Availability with Smilie G. Rogers, Esq.

[Please fill out this form, and Kim will contact you!](#)

Private Session Availability with Mary Kathryn Brennan, Esq.

[Request your session with Mary Kathryn by completing this form in its' entirety.](#)

Wednesday, April 7, 2021
5:00 pm- 5:30 pm

Wednesday, April 21, 2021
5:00 pm- 5:30 pm

Tax Season is Underway



To make filing easier, taxpayers should:

File electronically and use direct deposit for the quickest refunds. Check [IRS.gov](#) for the latest tax information.

Those who may have been eligible for stimulus payments should carefully review their eligibility for the [recovery rebate credit](#). Most people received Economic Impact Payments automatically, and those who

received the maximum amount don't need to include any information about their payments when they file.

People who didn't receive the payments or only received partial payments may be eligible to claim the recovery rebate credit when they file their 2020 tax return, even if they are normally not required to

file a tax return. Tax preparation software, including IRS Free File, will help taxpayers figure the amount. Taxpayers should remember that the stimulus payments they received are not taxable and don't reduce their refund.

Important filing season dates

1. **Thursday, April 15*** The due date for filing 2020 tax returns or requesting an extension of time to file.
2. **Thursday, April 15*** The due date for paying 2020 tax owed to avoid owing interest and penalties.
3. **Friday, October 15.** Due date to file for those requesting an extension on their 2020 tax returns.

*Governor Janet Mills announced Thursday, March 18, 2021, that the **State of Maine will move the deadline for Maine individual income tax payments from April 15, 2021, to May 17, 2021.**

The change aligns with the Federal government's recent extension of the Federal tax filing and payment deadline. Aligning Maine's tax filing and payment deadlines with the Federal government will maintain consistency for Maine people and provide them with added time to handle their taxes.

[Looking for your Refund Status?](#)

Spring
is finally
here!



Office Operations During the Pandemic

In the ever-changing landscape in which we find ourselves due to the COVID-19 Pandemic, we wanted to remind you that we are open during the Pandemic and here to make sure you are prepared; however, we have limited how, when, and where we work with clients to protect our clients and staff utilizing remote services and responsible social distancing measures.

1. Call us if you need assistance at 207-361-4680. Please don't come by unannounced as the door to the office will be locked. If you have documents you would like us to review in advance of a meeting, please send them via e-mail, US Mail, fax, or drop them in the locked box outside our main office door to the left.
2. We continue to conduct most meetings and document reviews by phone and Zoom. In-person document signings are brief and to the point.

3. We offer remote pre-signing document reviews and by telephone or video conference.
4. Upon entering our offices, we will require that you wear a mask and respect social distancing guidelines.

Thank you for your patience and understanding. Please stay safe and be well. We look forward to talking with you and seeing you soon.

Follow us across Social Media for Elder Law Insights!



Google Reviews

Check out what our clients
have to say!

Yelp Reviews

Brennan & Rogers, PLLC

Our Legal Blog: Planning for Life's
Transitions

Archived Newsletters

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Monday - Friday: 9 am - 5 pm
Saturday: By appointment
Sunday: Closed

*Satellite office located in
Kennebunk, Maine is staffed for scheduled
appointments made through the York office only *

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