



Informed and compassionate legal care

Brennan & Rogers, PLLC

279 York Street
P.O. Box 467
York, Maine 03909
207-361-4680

2 Storer St, Suite 111
Kennebunk, ME 04043*

***The Brennan & Rogers, PLLC Journal
February 2020 Edition***



The Setting Every Community Up for Retirement Enhancement Act, aka the SECURE Act, was passed in 2019 "to help Americans prepare for their retirement; however, in truth, what it does is accelerate income taxes on retirement accounts for many citizens. The ten-year rule marks the deadline for the disbursement of your retirement account following your death with a few exceptions regarding minor children, the disabled, and spouses. If your retirement accounts have been made payable to a trust (including a testamentary supplemental needs trust), it would be a good idea to have your estate plan reviewed.

**A Bipartisan Bill Meant to SECURE
your Retirement**



The Centers for Medicare and Medicaid Services have just released their guidelines regarding the community spouse for 2020. A "community spouse" is defined as the spouse of a Medicaid recipient who is living in a nursing home.

**CMS's Updated Financial Guidelines
for Community Spouses in 2020**

**We are now on Instagram and Twitter!
Are you following us?**



On Instagram #brennanrogerspllc



On Twitter @pllcrogers

Mary Kathryn delivered a keynote at A Place to Start

Mary Kathryn was invited by A Place to Start- A Place to Gather earlier this month to speak about estate planning issues vital to those who have Alzheimer's and Dementia. [A Place to Start- A Place to Gather](#) is a nonprofit located in Kennebunk, Maine that exists solely to "provide free hope, help, and guidance for Alzheimer's and Dementia Families through snack & chat social hours, luncheons, music therapy, drop-in hours for caregivers and loved ones, a lending library, support groups and so much more." It is easy to see what makes this place a safe space for people with Alzheimer's and Dementia, along with their caregivers, to congregate with others who are having similar experiences. Mary Kathryn spoke about both Financial Powers of Attorney and Health Care Directives and emphasizing the importance of getting these documents in place sooner rather than later is in the best interest of everyone involved. Long Term Care Planning and how to protect assets as much as possible was a question on a few people's minds as well. Guardianships and Conservatorships were other critical points made while touching on the importance of caregiver agreements. Guests were very captivated and had many questions with some about the new probate code. They walked away with some knowledge of what the next steps should be.



Check out more pictures on Instagram!



Thank you for making our recent Meet and Greet Events a success!

Our Meet and Greets were successes! We had the opportunity to make new connections who became clients, caught up with current clients, and reminisced with our more established clients. It was wonderful to connect with as many people as we did. Thank you to everyone who called, emailed, and came to see us. We truly do appreciate

you putting your trust in us for all your estate planning needs!



Reaching out to the snow birds!



If you know anyone who is planning an extended excursion, please share this information with them so that they are prepared. If they need an estate planning attorney, we would appreciate the referral!

Many preparations are made for leaving the area for an extended length of time, but one overlooked area of preparation is Estate Planning. We did a piece in our blog in October about Advance Healthcare Directives being accepted across state lines (<https://planningforlifestransitions.wpcomstaging.com/.../cal.../>) however beyond the most basic of documents; it is essential to have your all estate planning documents (i.e., will, powers of attorney, financial powers of attorney, etc..)in place in the event something happens to you, your loved one or both. Of course, we hope nothing happens other than you have a pleasant break from the cold winter weather, but life is unpredictable, and we only want you to be prepared.

Estate Planning for Snowbirds

February Awareness Month



American Heart Association.



American Heart Month and Go Red for Women

American Heart Month was proclaimed by President Lyndon B. Johnson via [Proclamation 3566](#) on December 30, 1963. Congress proclaimed on that day that every February would be designated as American Heart Month with the first one taking place in February of 1964. Go Red for Women works in conjunction with the American Heart Association to make the public

aware that heart disease is responsible for one out of three deaths in women making it the number one cause.

Important Office Hours Information

**Mary Kathryn and Smilie will be on vacation and unavailable from Monday February 17, 2019 through Friday February 21, 2019.
Thank you for your understanding!**

Follow Us on Social Media!



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Monday - Friday: 9 am - 5 pm

Saturday: By appointment

Sunday: Closed

*Satellite office located in [Kennebunk, ME](#) is staffed for scheduled appointments made through the York office only *

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