AUGUST 2022

ESTATE PLANESQ
LAW OFFICE OF KEITH R. MILES, LLC/PLLC

Estate Planning Council of North Georgia

NAELA
National Academy of Elder Law Attorneys, Inc.
MEMBER

Welcome to the Referral Directory for The Law Office of Keith R. Miles, LLC. This directory is designed to help anyone who is served by the firm, whether a current client, a prospective client, a co-counseling attorney, or an allied professional (such as a CPA, financial adviser, real estate professional, etc.). Estate Planning Attorneys understand that comprehensive estate planning requires a team of professionals and business services. As an estate planning attorney, I can guide you through the process of knowing your options and making the documents match your desired goals. However, I cannot help you (or your heirs) invest the funds. I cannot help you create the best income tax plans. I cannot help you by serving as trustee for a revocable trust. I cannot help you by opening a safe deposit box along with a bank account for your estate planning matters.

In other words, I need some help from others to get you to the destination properly. That means You also need help to get yourselves to the destination properly!

Please look through this directory and contact the professionals and businesses in here if you have a need. I have arranged the referrals to correspond to the background intake that you have (or will) submit to me as part of the process for having your initial consultation. Please go into my client portal and review your intake form (it's a valuable exercise to do anyway!).

If you already have someone that you really are confident in already, stay with that firm. However, if like many clients, you are not quite sure where to go for all the things that you may need then this directory will hopefully get you the assistance that you need.

Now goes the disclaimer. Of course, I cannot guarantee that every relationship, whether business or personal, will be fruitful for you. I can say that I have knowledge of these individuals and know that they are excellent at what they do for a living. However, in the end, it is about how YOU and that individual or company match. So, while I hope that will always be the case, if not, that is fine as well.

Please, if you do reach out to someone on the directory, please let them know that I sent you. I do not receive direct financial renumeration of any kind for doing so. But I do receive some goodwill, and we all understand that many times that is much more valuable in the long run!

Lastly, I am always looking for quality individuals and firms. If you have any suggestions that I might add to the directory, please let me know. That does not mean I will automatically add them. I must feel they will be a fit for my practice and my values. However, I will certainly investigate any suggestions with the utmost sincerity.

If you are a client, it is an honor to serve you. If you are a prospective client, I hope to have the honor to serve you. If you are a referral source, it is an honor to work with you. I pray that I have many more opportunities to serve all of you in the future.

Keith R. Miles

REFERRALS BY ASSET TYPE

REAL ESTATE

RESIDENTIAL REAL ESTATE AGENTS/BROKERS

SOME ESTATE PLANNING NEEDS FOR A RESIDENTIAL REAL ESTATE AGENT:

- Many Estate Planning clients have their focus on how to plan for their principal residence.
- With Elder law clients (and their families), usually the focus is how to plan for long-term care costs. Often, they may need to purchase property to do a spenddown of assets or purchase a home with a child and retain a life estate.
- For Probate clients, many personal representatives of an estate are seeking help on how to sell a house that was the principal residence of a loved one that has now passed.

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COMMERCIAL REAL ESTATE BROKERS/AGENTS

ESTATE PLANNING NEEDS FOR A COMMERCIAL REAL ESTATE AGENT

- Many Estate Planning clients have a strong desire to add to their real estate investment portfolio of properties.

- For Probate clients, many personal representatives of an estate are seeking help on how to sell an investment property that belonged to a loved one that has now passed.

Quinn Green

CENTURY 21 Connect Realty
880 Holcomb Bridge Rd, Ste 150
Roswell, GA 30076
(770) 713-0242 Mobile
(770) 713-0242 Phone
(770) 640-6800 Office
qgreen1@hotmail.com
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Aysha Treadwell

Commercial Real Estate Advisor
Virtual Properties Realty
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(404) 805-3464 Phone
cregwinnett@gmail.com
https://www.ayshatreadwell.com/

REAL ESTATE CLOSING ATTORNEYS

ESTATE PLANNING NEEDS FOR A REAL ESTATE CLOSING ATTORNEY:

- Georgia law requires a licensed attorney to close all real estate transactions. In other states, the title company handles the closing and matters pertaining to escrow. But in Georgia, an attorney does it.
- In Georgia, it is customary for the buyer of real estate to select the designated closing attorney. However, the seller may negotiate an arm's length choice, particularly when contributing to the buyer's closing costs.

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MORTGAGE LOAN ORIGINATORS

ESTATE PLANNING NEEDS FOR A MORTGAGE LOAN ORIGINATORS:

- For many estate planning clients, real estate is a centerpiece of their estate planning portfolio. It could be a principal residence or investment properties. Either way, more likely than not, the client will need a mortgage to purchase the property.

- A mortgage loan originator, or MLO, guides mortgage applicants and borrowers through the mortgage approval process, from preparing the loan application through closing. MLOs are knowledgeable about all the different types of mortgages.

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Mortgage Loan Originator
Southeast Mortgage
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Duluth, GA 30096
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BANK ACCOUNTS

COMMERCIAL BANKERS

SOME ESTATE PLANNING NEEDS FOR A COMMERCIAL BANKER:

- Opening a Bank Account for your Revocable Living Trust
- Opening a Safe Deposit Box to keep your Estate Planning Documents
- Obtaining the best rates on bank accounts, Certificates of Deposits, etc.

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TRUST OFFICERS

SOME ESTATE PLANNING NEEDS FOR A TRUST OFFICER:

- Setting up a Corporate Trustee for your Revocable Living Trust if you have issues with appointing family members whether due to skill or longevity concerns.

- Setting up a Corporate Trustee for a Special Needs or Supplemental Needs Trust for a beneficiary with a need for management and/or protection of government benefits.

A trust officer has many duties and responsibilities when administering a trust and thus requires many different skills. While overseeing the daily administration and asset management of the trust, they communicate with beneficiaries, grantors, and co-trustees. They manage and monitor investments, facilitate distributions, review, and file trust tax returns, and maintain accounting records. Administering the trust involves making sure distributions are paid out correctly and in a timely manner, while following the trust document.

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C 1-(404) 545-4785
F 1-801-729-2871
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RETIREMENT ACCOUNTS

FINANCIAL ADVISORS

SOME ESTATE PLANNING NEEDS FOR A FINANCIAL ADVISOR:

- Often retirement plans such as 401(k), 403(b) and IRAs are the largest dollar amount assets that estate planning clients own.
- In addition, as opposed to real estate, retirement accounts are often the most liquid assets that can be used by both the clients during life AND the beneficiaries after death.
- However, these assets may also be subject to large income taxes during life and estate taxes at death, which necessitates strong planning.

An advisor will work with you to understand your unique situation and figure out the best plan for you going forward. They will lay out the timeline for the way you want to live, consider your cash needs, and help you structure finances appropriately

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Wealth Management Advisor

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Mr. Stanley Funches, CFP®, ChFC®, CRPC®, MBA
President/Financial Advisor
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CPA/ENROLLED AGENTS/TAX PROFESSIONALS

SOME ESTATE PLANNING NEEDS FOR A CPA/ENROLLED AGENTS/TAX PROS:

A great tax professional can advise on specific tax situations such as:

- The sale of a property or business
- Determining the best structure for your business
- Tax planning strategies to minimize tax liability
- Income deferment
- Estimated tax payments

You can work with your tax advisor to:

- Discuss the viability of specific tax savings strategies.
- Provide updates on income/deductions throughout the year so they can run projections and modify estimated tax payments if needed.
- Surface any concerns in other areas of your life that could potentially impact your taxes.
- Help organize tax documents at tax-filing time

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McClellan & Associates CPAs, LLC
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STOCKS, BONDS AND BROKERAGE ACCOUNTS

FINANCIAL ADVISORS

SOME ESTATE PLANNING NEEDS FOR A FINANCIAL ADVISOR:

- Often stocks, bonds and brokerage accounts are the largest dollar amount assets that estate planning clients own.

- In addition, as opposed to real estate, stocks, bonds and brokerage accounts are often the most liquid assets that can be used by both the clients during life AND the beneficiaries after death.

- However, these assets may also be subject to large income taxes during life and estate taxes at death, which necessitates strong planning.

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CPA/ENROLLED AGENTS/TAX PROFESSIONALS

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AUTOMOBILES, BOATS, OTHER VEHICLES

PROPERTY AND CASUALTY AGENTS

SOME ESTATE PLANNING NEEDS FOR A PROPERTY AND CASUALTY AGENT:

- A property and casualty insurance agent are a person who is responsible for selling insurance products like homeowners, automobile, boat, and motorcycle insurance.
- These agents can sell on behalf of a specific insurance company or act as a broker that represents several different insurance companies.
- They work directly with customers to find the right combination of insurance protection to meet the customer's needs

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LIFE INSURANCE

LIFE AND HEALTH INSURANCE AGENTS

SOME ESTATE PLANNING NEEDS FOR A LIFE AND HEALTH AGENT:

Life and Health Insurance agents are aware of all solutions available including life, disability, and long-term care insurance.

Roxi Perkins

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BUSINESS INTERESTS

PROFESSIONAL EMPLOYER ORGANIZATION (PEO)

SOME ESTATE PLANNING NEEDS FOR A PEO

- Often clients have an estate where a business is a large percentage of the value of the estate.

- They may or may not have proper legal paperwork, which the business attorney can assist. However, often the structural aspect of Human Resources, Group Health Coverage, Workers Compensation, Payroll, 401(k) plans/profit sharing, etc. are keys to recruiting (and retaining) employees to make that business grow and become as valuable as possible.

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EMPLOYEE TESTING

SOME ESTATE PLANNING NEEDS FOR EMPLOYEE TESTING

- Often clients have an estate where a business is a large percentage of the value of the estate.

- Selecting the best and not onboarding problem employees is critical to making that business grow and become as valuable as possible.

ARCpoint Labs specializes in COVID-19 testing, pre-employment drug and alcohol testing, background screening, random drug testing, on-site and after-hours testing. They also offer a full spectrum of enterprise health and wellness testing services you can customize to meet your needs.

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OTHER ATTORNEYS

BUSINESS ATTORNEYS

Generally, a business lawyer helps companies of every size ensure that they are following applicable business regulations and that all business operations are legal.

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FAMILY LAWYERS

Divorce -Going through a divorce can be painful, complicated, and messy. Having adequate representation to handle your affairs from the beginning will assist in helping protect your rights in custodial issues, child support, property settlements and fair compensation when warranted.
Custody - The State of Georgia has specific guidelines on determining the awarding of custody, and family lawyers work diligently to ensure their clients have the best advocate on their side.

Child Support - The State of Georgia mandates both parents to responsibly provide for the care and support of their minor child. Child support was established as a means of meeting this responsibility in the event of a divorce or situation where the parents are unmarried.

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