



THE LAW OFFICES OF

**DAVID R. OKRENT**

DEVOTED TO ELDER LAW, ESTATE PLANNING & SPECIAL NEEDS CHILDREN



Helping plan  
your future.

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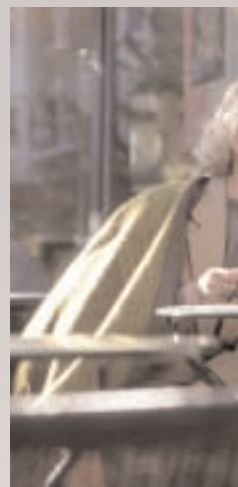
The Law Offices of David R. Okrent are dedicated to helping the elderly find the right answers to all of their legal questions... and to develop plans that assist in protecting their future independence and dignity. We treat every client with respect, care and compassion. THIS IS WHAT WE DO:

**ELDER LAW** | Elder Law focuses on protecting *your* assets, should you become disabled or face catastrophic medical expenses. An elder law attorney helps elderly clients and their families deal with the legal issues involved in growing older, including the handling of medical and financial decisions.

**ESTATE PLANNING** | Estate planning deals with probate and tax issues involved in leaving an estate. For example, the use of life insurance, revocable living trusts, family limited partnerships, and charitable giving to lower estate taxes. Only a law firm with sharply-focused expertise on the changing legal issues affecting the elderly can properly advise you.

**ESTATE ADMINISTRATION** | An Estate Administration begins upon the death of an individual. It refers to the manner and procedures necessary to resolve the decedents personal and financial affairs in a proper and timely manner. An estate administration can be simple or complex, the determination of which depends on many factors, not simply the size of an estate. Our firm has the experience to handle the simplest to the most complicated estate administrations.

**SPECIAL NEEDS CHILDREN** | Protecting the rights of our children and young disabled, and ensuring that they have access to every available resource is critical. Our firm has assisted families through the government maze to determine their children's rights before school age, upon entering and continuing in school and after that child becomes an adult in ensuring that their educational and other needs are met and in assisting families plan for the long-term care of their children.



- What makes up an Estate?
- Do I need life insurance and how should it be structured?
- What are the differences in estate administration laws and tax laws?
- Who will handle my estate upon my death?
- What exemptions am I entitled to?

### **What is the difference between Estate Administration and Probate?**

- What are some of the many estate planning tools and techniques, such as By-Pass Trusts?
- What is a living revocable trust, and should I have one?
- How do I use my IRA or retirement plan in Estate planning?

- Should my plan offer various ways to pay expenses?

### **Will my assets be protected?**

- What items can my estate deduct?
- Will Medicare cover the cost of a nursing home?
- Will Medigap insurance cover the cost of a nursing home?
- Long term care insurance – do I need it and what does it cover?
- What does Medicaid pay for, and how do I become eligible?
- Should I transfer assets?
- What is a health care proxy and do I need one?
- When is a Guardianship needed?
- What are powers of attorney and do I need them?

### **How do I plan for the financial future of my child, who has special needs?**



**BUSINESS SUCCESSION** | Business owners have special considerations when planning for their futures, including concerns like: *who will manage the business in the event of death or incapacity* and *how can it be ensured that your family will be supported by business income, after retirement?* Our office handles the formation, dissolution, purchase or sale of businesses as part of estate planning or as separate proceedings.

**REAL ESTATE** | Often, residential or commercial real estate holdings encompass a large portion of estates. The Law Offices of David Okrent handle the sale or purchase of these properties as part of estate planning or as separate transactions.

**GUARDIANSHIP** | Guardianship is a legal proceeding whereby a Court appoints an individual to assist an incapacitated person. The powers given to the Guardian can be tailored to meet the needs of the incapacitated person. The complexity of the proceeding can depend on many things. A law firm with the experience and sensitivity with respect to the issues that face the disabled, the young disabled and the suddenly disabled and their families can handle these matters efficiently and properly.

**ADOPTION** | The adoption of a child can bring great joy to a family, but it can also bring a myriad of court filings and legal proceedings that require strong representation. A law firm with years of experience in adoption cases can ensure that a family can spend their time on caring for a new child rather than legal issues.

**IMMIGRATION** | The Office gained experience handling immigration matters when assisting families in caring for a sick relative who was a citizen of another country and was seeing to stay in the United States with a caregiver or for more advanced medical treatment. It has since expanded its practice to include all immigration matters in this rapidly changing area of the law.



**WHAT WE CAN DO FOR YOU** | We invite you to call our office at (631) 427-4600 and schedule an appointment for a personal consultation at which we will provide you with a comprehensive information pack about elder law and estate planning. We will work together to develop and fine tune a personal and individualized plan that is right for you. Our staff of attorneys is headed by Managing Attorney David Okrent, CPA, Esq.

**ABOUT DAVID R. OKRENT, CPA, ESQ.** | Mr. Okrent has over 16 years experience in both the legal and accounting fields. He is an appointed officer of the Suffolk County Bar Association's Academy of Law, which is responsible for the education of the Bar Association Members. Also, as a member of The National Academy of Elder Law Attorneys, he serves on the Tax and Elder Law Committees for the Suffolk and New York State Bar Associations. He is the chair of the legal advisory board of the Long Island Alzheimer's Foundation and is a member of the Planned Giving Council of Good Samaritan Hospital. He is also an active member in the New York State Society of CPAs. Mr. Okrent is past Chairman of the Suffolk County Bar Association's Tax Committee, a past officer of the National Conference of CPAs and of the Association of Professional Financial Consultants. He is frequently invited to lecture on topics concerning seniors and has been interviewed numerous times on radio, television and in print. Mr. Okrent is a published authority on the subjects of Elder Law and Estate Planning.



## AREAS OF PRACTICE

Elder Law

Estate Planning

Estate Administration

Special Needs Children

## SUBCONCENTRATIONS

Business Succession

Real Estate

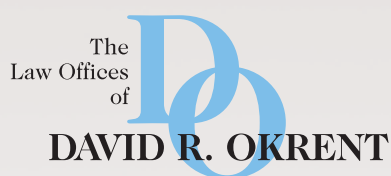
Guardianship

Adoptions

Immigration



## THE LAW OFFICES OF DAVID R. OKRENT



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