

# Estate Planning Weekly COVID-19 Update – 07.15.20

This weekly COVID-19 update is brought to you by our Chambliss [Estate Planning team](#). We are sharing articles, legal developments, external resources, and tips for coping during these uncertain times. Each weekly issue will cover various trends of vital interest in the world of estate planning, elder law, and special needs planning. To be added to our email list, please [subscribe](#).

## Dear Clients and Friends:

While many of us are working remotely at present, we are also collaborating to implement creative and resourceful solutions to meet the needs of our clients in this uniquely challenging time.

We are doing planning consultations, document signings, care coordination, drafting of documents, and all related work—in sum, all the types of work we usually do. We have generally moved most meetings to either Zoom video conference or audio conference calls. In person document signings at our office are generally being done abiding carefully by social distancing protocols. Moreover, the governors of Tennessee and Georgia have signed executive orders which enable “virtual document signings” for a limited period of time.

Please do not hesitate to contact us if we can assist you with your elder law, special needs planning, or estate planning needs.

— Dana, Greg, and your Chambliss team

## Webinar Recording Now Available

Dana and Greg recently hosted the webinar [Hot Topics in Estate Planning in a Time of Uncertainty](#). If you missed the webinar on July 8, or would like a copy of the recording, you can access it on [GoToWebinar's website](#).

The following topics were discussed:

- Strategic gift planning techniques in light of the upcoming election
- Importance of reviewing your estate planning documents on a regular basis
- Choice of fiduciary (executor, trustee, agent)
- Upcoming tax filing deadline – July 15, 2020
- The SECURE Act impact on estate planning
- Asset protection planning
- Answers to your specific questions

Watch the webinar now on [GoToWebinar's website](#).

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## Featured Article

### Section 1.01      A Message From Your Friendly Estate Planning Paralegals

By: [Jannine Rowell](#) and [Ashli Smith](#)

Let's face it, just thinking about death, let alone planning for your death, might not be at the top of your list for exciting things to do in 2020. However, now more than ever, it is important to have an estate plan in place. Your friendly Chambliss estate planning paralegals want you to know that we enjoy getting to know our clients, and we care about you. We take our job very seriously, and we understand how personal and important your estate plan and your family are. We want you to feel comfortable as we work together on such important personal matters. During the process, we hope to form long-lasting relationships with our clients, so that you feel like you always have a contact person to go to if you ever have any questions or need to make changes to your estate plan. We are fiercely loyal and committed to our clients.

#### **Things to consider if you're new to estate planning or it's been a while since you worked on your plan:**

- You may be thinking, "I don't have enough money or personal property to warrant having an estate plan." We are here to tell you that an estate plan, no matter how big or how small, is important in order to carry out your wishes after your death. It's not all about financial planning either. You may want to include a non-family member as part of your estate plan, or, on the other hand, you may want to exclude a family member. Perhaps you have a pet and want to ensure it is taken care of after your death. There are many reasons for having an estate plan tailored to meet your financial and personal goals.
- You may feel intimidated about meeting with an attorney. Believe it or not, attorneys are people, too. And, they even have a sense of humor! Our entire team (attorneys included) is made up of caring individuals with families of their own who understand how deeply personal and important estate planning is. We each want you to know that you are important to us and that we are here to help you navigate this process and come out comforted in the fact that you have planned for you and your loved ones' future.

**To help you understand the estate planning process, here is a brief overview...**

[Read More](#)

## COVID-19 Resources

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### **Four Ways the Coronavirus Pandemic May Affect Long-Term Care Insurance**

The coronavirus pandemic has had a devastating impact on those in nursing homes and other long-term care facilities. This has raised questions about how the virus has influenced the costs and provision of long-term care insurance.

[Read More](#)



### **Make Sure Your Beneficiary Designations Match Your Estate Plan**

Many types of property and investments pass outside of probate and allow you to designate who will receive them after your death. It is important that these designations are kept up to date and are consistent with the rest of your estate plan.

[Read More](#)

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## **Also Check Out...**

### **CMS Announces End to Waiver of Requirement That Nursing Homes Report Staffing Data**

Last week, [Justice in Aging](#) reported [CMS announced that it is ending the blanket emergency waiver of the requirement for nursing homes to submit staffing data](#) through the Payroll-Based Journal System. According to the memorandum, the waiver ends immediately, and nursing homes must submit data for April through June by August 14, 2020.

### **Increasing Number of Pet Trusts in Pandemic**

Many of us consider our pets family, too. We are seeing an increasing number of people wanting to make sure their pets will be cared for in case the unexpected happens. Please contact Dana, Greg, or a member of our estate planning team if you'd like to learn more about protecting your furry friend.

### **New IRS Announcement Allows Return of 2020 RMDs**

This Wealthspire Advisors article talks about the updated IRS rules for required minimum distributions (RMDs), allowing taxpayers who took RMDs early in 2020 to return the funds into their retirement accounts.

### **HHS Office for Civil Rights Resolves Complaint Alleging Discrimination in Tennessee's Crisis Standards of Care**

[Justice in Aging](#) announced the U.S Department of Health & Human Services Office for Civil Rights (HHS-OCR) announced that it [resolved a complaint against Tennessee](#) after the state updated its crisis standards of care (CSC) plan to remove criteria that discriminated against persons based on disability or age.

### **Disability Rights Tennessee Expands Services in Response to COVID-19**

In light of these unprecedented circumstances, [Disability Rights Tennessee \(DRT\)](#) has been responding to the ever-changing needs of Tennesseans with disabilities. Just as the impact of COVID-19 is broad and varied, so have been the issues they've addressed this year.

## **Coping With COVID-19**

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### **Are You Feeling a Mix of Emotions Due to COVID-19?**

According to the [HHS website](#), stress during an infectious disease outbreak can include:

- Fear and worry about your own health and the health of your loved ones
- Changes in sleep or eating patterns
- Difficulty sleeping or concentrating
- Worsening of chronic health problems
- Worsening of mental health conditions
- Increased use of alcohol, tobacco, or other drugs

It's important to address your stress. HHS put out a [video on Five Things About Staying Mentally Healthy](#), and [their website lists a number of resources](#) available for free and confidential support.

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### **How Colter Copes with COVID-19**

Colter is a Summer Associate at Chambliss and a law student at Vanderbilt University Law School. Some of the activities he enjoys in his free time to unwind are playing guitar and playing board games with his wife, Sloan.



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Our Chambliss team continues to monitor legal developments in connection with the COVID-19 pandemic. Please contact [Jim Catanzaro](#), [Justin Furrow](#), or your relationship attorney if you have questions or need additional information.

**Visit our COVID-19 Insight Center for our latest legislative and legal updates, articles, and resources.**