



# LAWYERS WITH PURPOSE

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## WHEN YOU HAVE A PAYING CLIENT

Attorneys are great multi-taskers. They have many great talents and constantly convince themselves they can do it all. But the truth of the matter is, this is often the demise of an emergent firm. The day-to-day back-office tasks compromise everything else; it's impossible to do it all.

That is why I am enthusiastic about the "Pay Per Trust" model. Finally law firms can outsource their back-office administrative activities to free themselves up to meet with clients and referral sources – the activities that create consistent cash flow. The best part is, this model also allows the team to focus on client services and referral relationship management.

Are you ready to make a move and start focusing your already minimal time on growing your practice...**without spending countless hours drafting trusts or hiring extra help? The BONUSES are:**

1. No contract at all. Only pay us when you have a client, whether that's once or multiple times a month.
2. Try out our back-office trust drafting and received \$100 off your first trust using the discount code of "HOLIDAY". But act now; this offer ends 12/31/14

Visit [www.paypertrust.com](http://www.paypertrust.com) to find out how to take pay per trust for a test drive. If it doesn't fit, you don't have to show here again. But I doubt that will be your result.

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## IF A SPOUSE IS ILL BUT A VETERAN ISN'T, CAN A COUPLE STILL GET AID & ATTENDANCE?

Victoria L. Collier, Co-founder, Lawyers With Purpose

No. While the veteran is alive, the claim is the veteran's. In cases where the Veteran is over 65 and healthy, but the Veteran's Spouse is ill, the best that the couple can qualify for is the base pension amount.

When determining which level of benefit that would be awarded, whether improved pension, housebound, or aid and attendance, the VA will look at the health of the Veteran alone. The health of the Spouse does not matter. Assuming a Veteran over 65, the Veteran meets the VA's initial definition of disabled. This places the Veteran at the base pension level. Unless the Veteran has more medical issues, there is no eligibility for housebound or aid and attendance. Again while the Veteran is alive, the health of the Spouse does not matter at this point.

But once the initial level is determined and eligibility is established based on the health of the Veteran, the fact that the Spouse resides in an assisted living is relevant for the income eligibility test. Currently a Veteran and Spouse can receive \$1,380/month in Veteran's Benefits at the base pension level. If the Veteran and Spouse's combined income exceeds this amount, they do not qualify unless their medical expenses outweigh their income.

It is at this point that the Spouse's assisted living expenses become relevant because the expenses are used in making the income eligibility determination. In order for those expenses to be an approved medical expense, the spouse needs to be examined by a doctor and a form 21-2680 must be filled out and turned in along with the application. While the form 21-2680 is entitled "Examination For Housebound Status Or Permanent Need For Regular Aid And Attendance" and is primarily used to establish housebound or aid and attendance if filled out for the veteran, it is used to help verify the spouse's assisted living costs as a valid medical expense, not turn in a housebound or assisted living claim for the spouse. Once the medical expense is established, the assisted living costs can then be offset from the Veteran and Spouse's joint income in order to try to meet the income eligibility test.

## THE ART OF SURRENDER

Molly L. Hall, Co-Founder, Lawyers with Purpose, LLC

The LWP partners began our customary quarterly partners retreat in Atlanta at 9 sharp. We began the day in customary fashion by analyzing quarterly goals. We reviewed who is doing what to reach goal, our Money Plan from and then where we have nobody leading.

Marketing was where the spotlight shined loud and clear. We quickly we are able to shift from driver mode into solution mode. We revisited hiring outside consultants, as we have done in the past. It would take at least six months to get them up and running; plus, how do we find someone who understands the dynamic of an estate and elder law firm vs. a hunt and kill mindset at all cost?

At the end of the day we agreed that I would go full-time into marketing. The organization needs me to lead it, own it and nurture it.

I'm not going to lie – I resisted. Hard. My control freak showed up immediately: "I know (control freaks always know best) that X will happen," "Who's going to lead Y," "Who's going to coach Z," "We have been making such great progress on Z, I can't just abandon 'em now."

I finally GOT IT. I have been working with team members for 17 years, hearing the exact same words when their attorneys ask them to step up and replace themselves. I never fully understood what the root of the resistance was. Now I get it.

The hesitation doesn't stem from fear of change. In all honesty, the biggest resistance comes to leaving with a feeling of abandonment – abandoning the team, the clients and what you have taken personal pride in developing and perfecting.

So we resist, we justify that "they need me" and we

attempt to control the situation, instead of investing in how we are going to become the next, better version of ourselves and create a better version of the business. Dang it, there it is again, that 2mm shift.

If we can detach from the "how" - what we are currently doing will get done, and anchor to how we are going to step into our new role/world/life, the art of surrendering begins.

Once I got on the plane, I got to work. I looked at what I am doing non-marketing-related and to whom I can responsibly shift it over. I came up with a suggested transition plan. I pulled out our marketing plan and realized not only that I can do this, but I will do this. I sat for the next two hours and 20 minutes while trapped on the plane and mentally surrendered to letting go of what was, to allow the new reality to permeate, and to embrace the sense of excitement, along with a healthy level of challenge.

But I couldn't do it without detaching first. Like my good friend Candee always says, "You must be willing to try it on."

That honestly is the process for giving up control and the art of surrendering. It's simply one small step (emotions, logistics and movement) at a time. And then you can course a realistic present and a future path and plan. Eventually you find your new normal. And that's really the story of growth.

FOR MORE GREAT TIPS  
& ADVICE, READ OUR BLOG  
[HTTP://BLOG.LAWYERSWITHPURPOSE.COM](http://blog.lawyerswithpurpose.com)



## MEMBER OF THE MONTH

Antoinette Middleton

### What is the greatest success you've had since joining LWP?

The greatest success I've had since joining LWP is having learned the philosophy of working on the law firm, instead of in it. In addition to having a juris doctor degree and legal expertise in estate planning, a private practice attorney must also know how to successfully run a business. Thanks to LWP, I now have business systems and processes to run such a practice and deliver quality services to our clients.

### What is your favorite LWP tool?

My favorite tool is the weekly legal technical webinars, which are recorded and can be viewed at my leisure. I'm not always able to participate in live weekly sessions, so having access to national estate planning experts answering questions on complex areas such as Medicaid (Medi-Cal in California) and asset protection for business owners and families is an invaluable resource.

### How has being part of LWP impacted your team and your practice?

Until recently, my team consisted of one attorney, two paralegals and one administrative assistant. By joining LWP we were able to utilize their models to develop various departments with functional job descriptions and duties. This helped team members become more accountable, which has led to greater accomplishments and a sense of pride. Everyone now knows that his or her contribution is important to the ultimate goal of running a successful law practice with lots of satisfied clients.

## ACTIONSTEP TRAINING SCHEDULE

Webinar #4: December 3, 2014

Reporting – Learn how to enter data correctly in order to generate reports to help track business

Webinar #5: December 10, 2014

Open Forum – Question and Answer Session about what has been covered in the first 4 weeks

Webinar #6: December 17, 2014

RMS – Learn how manage your professional workflows to generate RMS reports

Webinar #7: TBA due to Holiday Schedules

Maintenance – Learn about Maintenance Matter workflows and how to manage clients once they opted into the program.

## NOTABLE EVENTS

### Weekly

Live ListServ  
Every Monday-4:00 PM EDT

### Bi-Weekly

Marketing Roundtable  
2nd and 4th Fridays  
12:00 Noon EDT

### Monthly

Veterans Marketing Moments  
3rd Wednesday-3:00 PM EDT  
Veterans Back to Basic Training  
3rd Thursday-3:00 PM EDT  
Veterans Roll Call  
3rd Thursday-4:00 PM EDT

### Live Programs

Practice With Purpose  
February 3-5 Charlotte NC  
Tri-Annual Retreat  
February 4-6 Charlotte NC

To register for an event, visit our events page  
[LawyersWithPurpose.com/Events-for-Lawyers.php](http://LawyersWithPurpose.com/Events-for-Lawyers.php)

