Karen H. Shirley, P.C. Newsletter

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Dear Reader,

Happy New Year! A change in the year brings a number of new and exciting changes for my law firm - a new staff member, a new office and a new firm name. These changes allow me to serve you better!

This month's newsletter also discusses the role of a family meeting as part of estate planning. For additional estate and business updates and resources, visit my blog or check out our Facebook and Google+ pages.

Wishing all of you a joy filled and prosperous 2014!

warmly,

Karen Shirley

In This Issue

Karen H. Shirley P.C. is becoming Holmes Shirley Law

The law firm of Karen H. Shirley, P.C. will officially begin doing business as Homes Shirley Law as of February 2014. We have already begun to transition to the new name and hopefully will have the change complete as of February 1, 2014. Our telephone number, email addresses and website will not be changing.

Holmes Shirley Law opening new digs in downtown Castle Rock

We are very excited to announce that we are moving into a new office space located at 201 S. Wilcox Street in downtown Castle Rock. The Wilcox Professional Building has a wonderful mix of mainstreet companies, convenient parking and will allow us to provide better service to our clients. We will officially be open in the new location as of February 1st and look forward to having you stop by to see us.

For those of you not in the South Metro area, we will continue to make house calls and offer appointments at convenient meeting spaces around the Metro area since we believe these services are integral to being your personal family lawyer. Please let us know if you have any questions!

How to Make A Family Meeting A

Introducing Kari Simons, new Client Services Director

We are fortunate to announce that Kari Simons has begun working part time as our Client Services Director. She will be helping the firm with a variety of matters including our new membership program, scheduling and client follow-up.

Kari received her Paralegal Certificate in 2010 and holds a B.A. in Political Science and an M.A. in Conflict Resolution. She has worked in the areas of corporate transactions, personal injury, family law, business formation, and real estate.

Kari can be reached at support@coloradoestatelaw.com For more information about Kari please visit our website.

Please join me in welcoming her to the firm.

Upcoming Events

JANUARY
January 25th, 9am-2pm
The Great Grange Book and DVD Exchange in The Meadows

FEBRUARY
February 3rd, All Day
Grand Opening of Holmes Shirley Law, 201 S. Wilcox

February 8th, 8am-3pm
Colorado Healthy Living Expo, Douglas County Event Center

February 9th, 1:30-3pm
Client Appreciation Event at

Successful Part of Your Estate Planning

You've made the hard decisions, your documents are signed, your trust is funded, and a business succession plan is in place. Congratulations, you have put an estate plan in place. Now it's time to make sure your family understands how your plan will work and what they may need to do if you become ill or when you die.

Why Plan a Family Meeting
Having a well-run family meeting in which your plans are explained will help prevent misunderstandings and confusion in the future - an important benefit for executing a comprehensive plan in the first place.

Who Should Be There
Limit the meeting to adults. Make arrangements for the care of young children so you have everyone's full attention.

Include your advisors. Ask your estate planning attorney, financial planner, CPA or other important advisors to participate. They will be able to explain how your plan works and why key decisions were made. Their varied expertise and focus also bring multiple perspectives.

Be prepared.
Expect there to be some anxiety as the meeting begins, for these are often sensitive issues. Allow for and encourage questions and discussion. Putting issues out in the open can be difficult at first, but it often leads to greater understanding and acceptance.

Make an agenda.
The agenda should cover your objectives, purposes, plans and expected outcomes. Make a list of the topics you want to cover, so nothing gets missed in case the meeting becomes emotional. No specific financial information or values of assets needs to be disclosed, instead keep to a general explanation of what you have planned and why.

If you would like us to help you plan a family meeting, please call us at 720-248-7621.

This article is adapted with permission from an original prepared for its member attorneys by WealthCounsel. For additional information visit: www.estateplanning.com

Cookies'nCreama in Castle Rock

February 15th, 6:30-8:30pm
Daddy Daughter Ball,
Douglas County Event Center

February 21st, 4:30pm-8pm
Estate and Business Information Table at Little Monkey Bizness in Lone Tree.

MARCH
March 12th, 9:30 -10:30 am
Intro to Kids Protection Planning at Cookies'n Creama in Castle Rock

March 28th, 11am-4pm
14th Annual Empty Bowl,
Douglas County Event Center