

Holmes Shirley Law

Estate Planning

Small Business

720-248-7621

www.HolmesShirleyLaw.com



Dear Reader,



Happy February and
Welcome to the Year of the
Horse!

Legend has it that in ancient
times, Buddha asked all the
animals to meet him on
Chinese New Year. Twelve

came, and Buddha named a year after each one. He
announced that the people born in each animal's year
would have some of that animal's personality.

Those born in horse years are cheerful, skillful with money,
perceptive, witty, talented and good with their hands.
Rembrandt, Harrison Ford, Aretha Franklin, Chopin,
Sandra Day O'Connor, and President Theodore
Roosevelt were born in the year of the horse.

May you have a prosperous and abundant year!

5 Steps to Financial Security

I recently attended a
wonderful webinar by Jean
Chatzky, author of Money Rules:
The Simple Path to Lifelong
Security. Among the other
pointers she shared were the
following five steps for financial security:



1. Make a decent living
2. Spend less than you make
3. Save and/or invest the rest

New Office Location

We have moved into our new
office in Castle Rock at:

201 S. Wilcox Street, Suite 102

The building is between the
library and Plum Creek on the
west side of Wilcox. Our
exterior signs are not yet
complete so if you are stopping
by to visit, look for the Allstate
or Edward Jones - we are in the
same building.

Upcoming Events

Sunday, February 9th

Client Appreciation 1:30-3pm
Location: Cookies and Crema

Saturday, February 7th

[Daddy Daughter Ball](#)

Location: Douglas County Fair
Grounds

February 15th-23rd

[Colorado Home and Garden Show](#)

Location: Colorado Convention
Center

March 7th-9th

[Rocky Mountain Horse Expo](#)

Location: National Western
Stock Complex

4. Protect your financial life
5. Give back

While she provided more in-depth information on how to get started with or support each step in her presentation, I felt sharing the simplicity of the above steps provides good food for thought. If you want to learn more about "making money make sense" visit [her informative website](#).

2014 Tax and Estate Numbers

A few reminders and updates on 2014 tax numbers:

The estate tax exemption amount increased to \$5.34 million per individual (\$10.68 per married couple) for 2014. Estates amounts in excess of the exemption are taxed at 40%.

The annual gift tax amount remains at \$14,000 with a lifetime exemption of \$5.34 million. Keep in mind gifts between spouse are generally tax free unless the receiving spouse is not a U.S. citizen.

If you have questions about these amounts or other estate planning or tax matters, please give me a call at 720-248-7621 or contact your CPA.

Sincerely,

Karen Shirley
Holmes Shirley Law

Wednesday, March 12th
Kids Protection Planning Intro
Seminar 9:30-10:30am
Location: Cookies and Crema

Thank You!

Our best new clients usually are referrals from the wonderful clients we already have! This month we would especially like to thank:

Claudia Smith
and
Rebecca Russo

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