

• HAPPY •

March



Looking Ahead:

- ***Tuesday, March 11th @ 2:00pm: “6 Myths of Estate Planning”***
Freedom Plaza - 13373 N. Plaza Del Rio Blvd, Peoria, 85381
Attorney Darren Richardson
- ***Tuesday, March 25th @ 10:00am: “What Happens to Your Estate When You Die?”***
RISE Learning: Rio Salado College - 12535 W. Smokey Dr. Surprise, 85378
Attorneys Dave Eastman & Darren Richardson
- ***Thursday, March 27th @ 9:00am: “I Moved to Arizona From Another State, Do My Documents Need To Be Updated?”***
The Grand, Lifelong Learning: 19781 N. Remington Dr. Surprise, 85374 (Part 1 of 2)
Attorneys Dave Eastman & Darren Richardson
- ***Monday, March 31st @ 11:00am: “What Happens To My Estate When I Pass?”***
Shepherd of the Hills Church: 13658 W. Meeker Blvd, Sun City West, 85396
Attorneys Dave Eastman & Darren Richardson
- ***Thursday, April 3rd @ 9:00am: “I Moved to Arizona From Another State, Do My Documents Need To Be Updated?”***
The Grand, Lifelong Learning: 19781 N. Remington Dr. Surprise, 85374 (Part 2 of 2)
Attorneys Dave Eastman & Darren Richardson



What Happens to My Estate Plan if I Move to Another State?

If you are moving to a new state, or if you are considering moving to another state, your estate plan may not be top of mind. It is important to meet with an estate planning attorney when you move to another state to discuss what changes should be made to your estate plan. Below are some common examples of when updates may be necessary:

1. Married couples moving from a separate property state to a community property state (Arizona) could impact your estate plan. Community property states like Arizona afford tax advantages to married couples that separate property states do not. There are only nine (9) community property jurisdictions in the United States, so it is important to have your estate plan reviewed if you are switching from a separate property jurisdiction to a community property jurisdiction or vice versa.
2. Health care directives such as your living will, health care power of attorney, and mental health care power of attorney are state-specific documents. Thus, if you move to another state, and present an Arizona health care directive to the Ohio hospital for example, there is a high probability that document will not be honored. Each state has its own forms, provisions, and laws that will likely require you to update your existing health care directives.



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3. Like your health care directives, there is a high probability that your financial power of attorney will not be honored in your new state. More than that, financial powers of attorney are increasingly not being accepted by financial institutions. Therefore, if you have a financial power of attorney and are moving to a new state, you should meet with an estate planning attorney to 1) update the document to your new state, and 2) discuss better options to address incapacity issues.

If you are considering, or in the process of moving to another state, please reach out to us. We would be happy to provide you suggestions on what steps you should take. It is important to us that your estate plan continue to work, no matter which state you live in. -Jackie Chaney, Paralegal - Eastman Estate Planning

FINCEN ANNOUNCES TEMPORARY RELIEF FROM BOI FILING DEADLINES UNDER THE CTA

On February 27, 2025, the Financial Crimes Enforcement Network (FinCEN) announced that companies failing to meet the current deadlines for filing or updating their Beneficial Ownership Information (BOI) reports under the Corporate Transparency Act (CTA) will not face fines or penalties.



For most companies, the existing deadline is March 21, 2025. However, FinCEN plans to issue an interim final rule by that date to extend BOI reporting deadlines. Additionally, FinCEN intends to seek public input on potential revisions to the current BOI reporting requirements. Further updates will be provided as FinCEN releases additional guidance.

March

Team Bonding at the happiest place on Earth!



"We are not a team because we work together. We are a team because we respect, trust & care for each other."



Paralegal Tip - Donna Schubert

Color matching idea

Those throw pillows you found on sale at the mall are so pretty... you're just not sure if they will match the colors in your family room or bedroom. To prevent this color confusion in the future, collect paint chips and fabric swatches in a business card holder and keep them in your purse. Then when you're shopping, you can take a quick look to confirm that the item is a match.

*this also works great when trying to match colors for that perfect outfit.

Moving tip

When moving furniture, take your orphan socks and put them on the bottom of the legs of the furniture you are wanting to move (just like you would put the sock on your own leg). Then the furniture piece will slide easily on your tile or laminate flooring.



Green Chili & Cheese Scrambled Eggs

- 18 eggs
- $\frac{1}{2}$ - $\frac{3}{4}$ C cottage cheese
- 6-8 oz. Green chilies
- 8 oz. Block aged white cheddar cheese, shredded (divided in parts - 5 oz mixed in with the eggs, 3 oz melted over the top) - Costco's Coastal Aged Cheddar & Tillamook are the best. Cracker Barrel is delicious too.
- Generous amounts of salt & pepper



Whisk the eggs and add the cottage cheese. On low - medium heat, cook the egg mixture slow and low (I added 1 Tbsp butter, you can use a cooking spray as well). Add salt and pepper. Once the eggs are nearly fully cooked (up to 10 minutes) add the green chilies, the shredded cheddar cheese, and cook until the eggs look a LITTLE dry and wetness doesn't coat the pan. Taste for more salt and pepper. Add the remaining shredded cheese for melting atop, turn off the heat and put a lid on pan to set for 5 min. Let residual heat finish melting the cheese.

Serve with crusty sour dough.