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## Principles of Client Service

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Bolhouse, Baar & Lefere is a team of dedicated attorneys, legal assistants and support staff committed to providing the highest quality legal representation possible to our clients. Our *Client Service Principles* are at the heart of all we do.

### *Integrity*

Every member of our firm promises to act in a professional and ethical manner and with integrity and honesty at all times.

### *Responsiveness*

We are prepared to meet your legal needs efficiently and in a timely manner to help you resolve your issues quickly. We promise to learn about you and your goals in an effort to make our attorney-client relationship a positive one.

### *Quality*

We are committed to excellence in everything we do and promise you the highest quality legal services possible.

### *Value*

The cost of our services is an important consideration for you and we promise to provide services at costs that are fair and reasonable.

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## Estate Planning



*Planning Today  
for a Secure Tomorrow*

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## ***INTRODUCTION***

Estate Planning is a process designed to address your welfare and needs, plan for your own personal and health care if you are no longer able to do so, position your assets for easy transfer, protect your minor children by designating guardians, minimize transfer or estate taxes, and avoid the time and expense of probate.

The probate and estate planning attorneys at Bolhouse, Baar & Lefere are skilled at helping a diverse range of clients, from young families with small children to senior citizens enjoying retirement. We work with clients who have very small estates as well as those whose assets are valued in the millions of dollars. We provide a wide range of estate planning services from simple wills and powers of attorney all the way to complex living trusts and sophisticated business succession plans.

Because tax laws affecting estate planning change often, we continually monitor legislative activity and attend continuing legal education classes to maintain our expertise. In addition, we regularly conduct Estate Planning Seminars for our clients and for the community at large.

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## ***ESTATE PLANNING SERVICES***

Comprehensive estate planning and probate services for individuals and families include:

- Establishing living trusts to avoid probate
- Creating succession plans for transferring family businesses
- Minimizing, deferring or eliminating death and gift taxes
- Designating guardians and creating custodianships to protect minor children
- Establishing discretionary trusts to preserve governmental benefits for the elderly or disabled
- Planning for disability by:
  - Drafting durable powers of attorney and living trusts designed to avoid probate
  - Drafting patient advocate designations and living wills to address medical treatment concerns
  - Preserving benefits through careful Medicaid planning
- Representing clients in all matters involving probate court including:
  - Administering decedents' estates
  - Handling probate disputes such as will contests and claims against estates
  - Representing clients in guardianship and conservatorship matters



## ***ESTATE PLANNING TOOLS***

We use a variety of Estate Planning tools to meet our clients' goals and objectives. The most common are:

### *Wills*

A will is a written document of how your assets should be administered upon your death. A will does NOT avoid probate.

### *Revocable Trusts*

A revocable Trust is a contract whereby one individual, the "Grantor," gives property to another individual, the "Trustee," who agrees to manage and distribute the property for the benefit of a "Beneficiary" as specified in the Trust Agreement. The primary advantage of a trust is that it avoids the time and expense of the probate process.

### *Powers of Attorney*

A power of attorney designates another person to act on your behalf in financial and business matters. It terminates automatically upon your disability unless originally set up as a durable POA.

### *Healthcare Powers of Attorney*

A Healthcare POA (Patient Advocate Designation) appoints another person to make healthcare decisions for you if you become unable to do so.

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