

**MICHAEL A. KOENECKE**

**ATTORNEY AND COUNSELOR**

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*To whoever purchased my estate planning services at the 2018 St. Paul School Auction:*

Thank you for supporting St. Paul the Apostle School! The services I have donated include Wills for a couple (including, as necessary, bypass and descendants' trusts), Statutory Durable Powers of Attorney, Medical Powers of Attorney, Directives to Physicians, Declarations of Guardian, Appointments of Agent for Disposition, and HIPAA (health care information) Authorizations. If your overall estate is under \$20,000,000 and you do not own property in another state, this will be sufficient to insure that you will take full advantage of federal tax laws to avoid estate taxes entirely, minimize probate expense, and pass your property the way you wish. (At least, that is the state of the law in 2018. We can only guess at what Congress will do after the next election.)

Since the law may change in a couple of years, we will need to be flexible in our planning. In any event, your situation may require more extensive planning, and I will spend whatever time is necessary to discuss all your alternatives with you. If you need, for example, a revocable living trust in addition to wills, or formation of entities such as family limited partnerships or irrevocable trusts, that is not included in the services I am providing. I will *not* recommend anything you do not need.

I have enclosed a comprehensive Family Information form, which might help in getting your information organized. You may also download a fillable PDF version of the form from <http://koeneckelaw.com/public>, which might be easier to work with. I do not need everything filled out to get started, but it is useful to have the extra information available.

I ask that you call me to set up an appointment within the next ninety (90) days, and that we complete this within 180 days. In any event please call as soon as possible, as it is easy to procrastinate. Thanks again.

## ST. PAUL THE APOSTLE SCHOOL 2018 AUCTION

# Estate Planning Services

*This Certifies that the Bearer of this Certificate, having purchased these services at the St. Paul the Apostle School 2018 Auction, shall receive Estate Planning Services for an individual or a married couple, consisting of Wills (including, as necessary, bypass and descendants' trusts), Statutory Durable Powers of Attorney, Medical Powers of Attorney, Directives to Physicians, Declarations of Guardian, Appointments of Agent for Disposition, and Health Care Information Authorization forms from Michael A. Koenecke, Attorney and Counselor. This certificate expires on August 31, 2018.*

*In Witness Whereof, this has been signed effective as of the below-noted date.*

*Dated:* March 3, 2018

(SEAL)

MICHAEL A. KOENECKE, ATTORNEY