



CASE STUDY: SUSIE MAURO

AT A GLANCE

CHALLENGES

- Feelings of confusion & overwhelm
- Over-reliance on spouse for financial matters
- Loss of control over legal affairs
- Complex estate administration

RESULTS

- Attained peace of mind
- Achieved independence
- Felt more secure in future
- Simplified legal process



"With the help of Roth Elder Law, I've become a stronger and more independent person. I've had to learn to do this on my own, as I didn't have my husband to turn to. I was very, very grateful for all their work, and I feel they went above and beyond. I've been very pleased."

SUSIE MAURO

BACKGROUND

Margaret "Susie" Mauro is a retired elementary school teacher with two successful adult sons and a beloved granddaughter. When Susie's husband Ron sadly passed away, she sought a new lawyer to support the administration of a complex estate. She enlisted Roth Elder Law to help with their estate administration and continues to work with the firm on estate planning and other matters.

CHALLENGES

Susie felt overwhelmed and confused by the complicated estate administration process. Ron had always handled the finances, so when he passed, Susie was left with responsibility for an area she knew nothing about, during an already difficult time. To make matters worse, the original attorney her husband retained offered little guidance and support, leaving Susie frustrated.

"I was so overwhelmed with the number of documents our original lawyer gave us," Susie says.

It was important to Susie that the lawyer she hired would not only help with the day-to-day estate administration process but also guide and counsel her. She didn't simply want to hand the process over to the experts, she wanted to be involved and feel like her wishes were heard during each step. Susie also didn't want to be taken advantage of as a "grieving widow" – and suffer financially through lack of knowledge. She desired to complete certain areas of the administration herself, in partnership with a lawyer with whom she felt comfortable and put her back in the driver's seat of her family's future.

SOLUTION

Roth Elder Law offers carefully designed estate, trust and business succession plans, for clients who want to be proactive in making things easier for their loved ones. Their services are straightforward and easy to understand, so clients can focus on what's important – their families and future.

The team of Patrick J. Roth, Esq., CPA and paralegal Michael Hamula helped Susie through the administration of her husband's trust and assisted in setting up a new trust in her name. They worked together through numerous, complex steps, including selling her jointly-held home and getting various vehicles retitled and licensed in her name. The Roth Elder Law team made Susie feel comfortable from the outset and enabled her to take control of the situation with a clear and concise plan.

As Susie explained, "Roth Elder Law really listened and got to know me; nothing was too big or too small for them to answer."

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RESULTS

Roth Elder Law took the time to tailor the estate administration process to Susie's specific needs and the future needs of her family. As a result, Susie benefitted from an outstanding, caring experience:

Independence and confidence: After just a few months of working with Roth Elder Law, Susie felt she was not only in control of the estate administration process but had become "pretty good at it." She felt more independent and gained peace of mind.

"After Roth helped me get through all the things I needed to get through after my spouse passed away," Susie says. "I've discovered what I can do on my own. I've become very independent, I feel stronger, and I feel like I can take care of things now."

Straightforward process: Instead of drowning Susie with paperwork, the Roth Elder Law team provided her with the information she needed, in a simple and straightforward way.

"Michael and Patrick would really anticipate what I would need to settle my husband's affairs," Susie explains. "Everything was so easy and simplified. They led me through the whole process and spoon-fed me, which I desperately needed. It helped me to understand more about what was going on."

Compassion and care: The Roth Elder Law team believes in taking the time to listen and lend a compassionate ear to their clients.

"I felt that they were very honest and compassionate about my situation," Susie says. "They understood what I was going through. They knew I was overwhelmed."

Peace of mind with a personal touch: In addition to helping Susie gain control over her assets and trust, Roth Elder Law went above and beyond what most attorneys will do for their clients. From driving an hour to Susie's house during the harsh winter months, to personally sitting at the DMV to ensure vehicle relicensing was resolved in a timely manner, nothing was too much trouble for Michael and the Roth Elder Law team. And it didn't stop there: Susie felt she could call her Roth team at any time, which made all the difference during an emotionally draining period.

"They did everything to make it convenient for me. If we could do it over the phone, we did that," Susie says. "I was so appreciative that Michael would come to the house; in fact, I only went to Patrick's office once, for the final signing of all the papers. And I feel like I've made a new friend in Michael, too!"

Roth Elder Law isn't your average law firm. They truly care for their clients and offer peace of mind with a personal touch. At their core are a profound understanding, compassion, and commitment to supporting clients through challenging times in their lives.

Book a consultation today to learn how Roth Elder Law can help with your estate planning and administration needs.

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