

Legal Insights

Practical Legal Solutions



Legal Insights is a newsletter of timely and practical legal information that we hope you can use in your professional and personal pursuits. Please contact your attorney at [Nicola, Gudbranson & Cooper](#) if you have any questions or comments or if you would like to suggest topics of interest for future issues.

[Do I Need a Trust?](#)

[Bryan Palmer](#) looks at the ways trusts can help families and individuals achieve their financial planning goals.

“Trusts are often viewed as the most ‘optional’ part of an estate plan. But you will do yourself a disservice by not considering how this powerful estate planning tool can help you reach your goals. You should consider the following questions when deciding whether a trust is appropriate for you.

Q: Do I want to control who is responsible for managing my assets if I become incapacitated?

Without a trust or a power of attorney honored by all the financial institutions where you have assets, a probate court appoints a guardian to manage your estate when you are no longer able to do so. That process – which may be open to the public – gives the probate court ultimate control over who serves as your guardian.” [Read more...](#)

[Form I-9 Flexibilities Allowing Remote Review of Employment Documents Extended Through July 2023](#)

DHS and ICE recently announced the extension of their guidance to allow employers to remotely verify Form I-9 information. [Annie Grove](#) looks at how to benefit from this extension.

“The U.S. Department of Homeland Security (DHS) and the U.S. Immigration and Customs Enforcement (ICE) announced on October 11, 2022, that their guidance on Form I-9 flexibilities will be extended until July 31, 2023.

The Form I-9 flexibilities – initially announced in March 2020 at the start of the COVID-19 pandemic – suspended the mandatory “in-person” review of documents when employees are hired. Instead, employers are permitted to examine documents remotely. Generally, employers must complete the in-person review of I-9 documentation by the third day of employment.” [Read more...](#)

[New Year’s Resolutions: Updating Your Estate Plan](#)

The New Year is a perfect time to update your estate plan, writes [Elizabeth Klucher Reynolds](#):

“As the year comes to an end, we often reflect on the events that have occurred over the past 12 months. Many have toasted to formal unions, mourned the loss of loved ones, and celebrated new lives being brought into the world (and their family).

During this contemplative period, some of us may think of last year’s goals and begin to consider our goals for the New Year. Whether you plan to focus on a healthier lifestyle with a better diet and exercise, financial goals, such as saving for retirement, or other personal objectives, one goal I would urge you to consider is updating your estate plan.” [Read more...](#)

[Firm News](#)

The latest on new arrivals, recognition of the firm and our lawyers, and more:

“NGC Adds Three New Attorneys to Estate Planning and Immigration Law Teams

We’re pleased to announce the arrival of Associates Bryan Palmer, Elizabeth Klucher Reynolds, and Anne Grove to the firm!

For nearly ten years, Bryan has assisted families and individuals in their estate and special needs planning. He brings the firm’s clients considerable experience in helping fiduciaries navigate the complex and unfamiliar probate and trust administration process to ensure the smooth transfer of assets. He also advises individuals and privately held businesses on a wide range of real estate and corporate transactions.” [Read more...](#)

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If you have questions concerning any of the items discussed above, please contact your attorney at [Nicola, Gudbranson & Cooper](#), (216) 621-7227.

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