

BUSINESS SPOTLIGHT

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ESTATE PLANNING MADE SIMPLE

Many of us procrastinate, especially when it comes to uncomfortable situations. Center Grove resident Robert Johnson understands this too well as an attorney who focuses in estate planning. To illustrate, Johnson remembers a client and friend who called the night before his surgery. The request? He wanted his will and health-related documents in order. That trip to the hospital reinforced for Johnson the importance of planning and personal attention in preparing for incapacitation or death.

That is what is different about this attorney. He specializes in creating a personal estate plan on your schedule and with your needs as the focus. Estate planning can be daunting with specific consideration to clients' personal needs. Johnson seeks to simplify and work closely with each individual and family. Center Grove residents Angie and Mickey McDaniel called Johnson to draft an estate plan. "Bob did an exceptional job explaining everything and giving us much comfort," Mickey said. Angie added that Johnson's informal meeting style demystified the process, especially in discussing the importance to their children. "It was very simple. He sat down and spoke with us and answered all our questions," she said.

His goal in estate planning is to not only make it specific to his clients' needs but also to make it simple. For example, the fixed price package of \$975 for a couple includes two wills, powers of attorney (POA), living wills and health care POAs along with initial consultation and answering questions during the process. "What's different about this is I can meet clients at their convenience wherever and whenever they choose," said Johnson. "If you need to meet Saturday morning at your kitchen table, we'll make it work." This is all about meeting clients' needs on their schedule with an understandable process and an affordable fee.

Johnson recommends reviewing an estate plan every 10 years or after defining life events such as births of children or grandchildren, changes in assets, or the death of a spouse. Clients often choose to create education trusts for their grandchildren or change how and when children inherit assets.

"We write estate plans in such a way that provides for some of these changes. However, we can't always anticipate the curve balls that life throws at us so we plan with an eye to the future," said Johnson.

Johnson began his career as a journalist working for the *Evansville Courier & Press* before pursuing a law degree from Indiana University

at Indianapolis. His expertise became utility law, but when friends began asking him for help in estate planning a decade ago, Johnson discovered he enjoyed working personally with clients. However, he didn't leave journalism completely. Johnson currently writes a twice-weekly sports column for the *Daily Journal*. Since 1992, Johnson and his wife, Kathy, have called Center Grove home. ■



RESOURCES FOR ESTATE PLANNING

- BASICS OF ESTATE PLANNING: bit.ly/RKJbasics
- ESTATE PLANNING: bit.ly/RKJestate
- WILLS, TRUSTS & PROBATE: bit.ly/RKJwills
- CONSUMER TOOLKIT FOR HEALTH CARE ADVANCE PLANNING: bit.ly/RKJhealth