UNRUH TURNER BURKE & FREES

ATTORNEYS AT LAW

Douglas L. Kaune

120 Gay Street
Phoenixville, PA 19460
Phone: 610.933.8069
dkaune@utbf.com

Douglas Kaune is a shareholder and partner with Unruh, Turner, Burke & Frees where he has practiced since 1996. He is Co-Chair of the Estate planning and Administration Section and Chairman of the Elder Law Solutions Section of the Firm. His practice is focused in the areas of estate planning, estate and trust administration, creditor and asset protection, elder law, nursing home and Medicaid planning.

Doug loves spending time with his wife, Amanda, and three wonderful sons, James, Jackson and Thomas. He loves the beach and travel throughout the U.S. and abroad. He played basketball at Dickinson College and coaches all three of his sons' basketball teams. He exercises regularly and enjoys swimming, biking and hiking. He is an avid Philadelphia sports fan.

A selection of Doug's typical estate planning client cases and accomplishments include:

- Preparation of wills, trusts, powers of attorney & living wills.
- Preparation of trusts used to protect the inheritance clients leave to children from divorce, creditors and law suits. These are custom tailored trusts, intended to provide protection and ease of use for adult, capable beneficiaries. In this world of increased divorce rates and litigation risk, these trusts are key component to a good estate plan.
- Preparation of spousal trusts used to help insure the use of both husband and wife's federal estate tax exemptions. Additionally, spousal trusts are used to protect and preserve assets in second marriage circumstances, where one spouse wants to make sure assets make their way to children from a prior relationship.
- Preparation of revocable living trusts used to help clients avoid the probate process so that their beneficiaries receive their inheritance more quickly, more easily and with less expense.
- Preparation of Supplemental Needs Trusts for the benefit of disabled beneficiaries. If properly funded and managed, these trusts are key to protecting and preserving the inheritance for these disabled beneficiaries, while helping to insure their continued government benefits. We regularly prepare both self settled and third person Supplemental Needs Trusts.
- Counseling clients on how to use proper planning to reduce or eliminate the federal estate and PA inheritance tax that would otherwise reduce their estate value.

<u>What Doug enjoys about his estate planning practice</u>: Working in a collaborative way with clients to formulate an effective plan to accomplish their desired goals. Seeing clients leave the signing meeting relieved to know that they have done something to protect and preserve their assets for their children and beneficiaries.

A selection of Doug's typical estate and trust administration cases and accomplishments include:

- **Representation of Executors of a decedent's estate. Representation of Trustees, both during the lifetime and after the death of the Trust creator.**
- **Preparation of all probate documents necessary for the formal appointment of the executor and preparation of all probate filings throughout the estate administration process.**
- **Gathering of all asset, expense and debt valuation information necessary for the preparation and filing of the PA inheritance tax and federal estate tax returns.**
- **Liability management for the Executor and/or Trustee to help keep them protected from the many personal liability risks they confront.**
- **Family mediation for those estates with hard to manage relationships. Not all families and beneficiaries get along with one another. It is important to have counsel who is sensitive to these situations and adept in bringing calm to the process in order to help avoid the need for court involvement and expensive litigation.**
- **Representation of estates ranging from $500,000 to over $100,000,000.**

<u>What Doug enjoys about his estate and trust administration practice</u>: Helping to relieve some of the stress related to a very difficult time.

A selection of Doug's typical Elder Law and Medicaid Asset Protection Cases and accomplishments include:

- **Representation of clients who would like to plan ahead of time to insure that some or all of their personal assets are protected from the rising cost of long term nursing care. Counseling clients on the planning options and pitfalls to be aware of so they can maximize the asset protection they are looking to achieve.**
- **Preparation of Medicaid Asset Protection Trusts intended to trigger the five year Medicaid look back period. By using this planning technique, we regularly put our clients in a position to protect their homes and hundreds of thousands of dollars from the nursing home spend down process.**
- **Preparation of Family Caregiver Agreements and overseeing the protection of the home through the family caregiver exception.**
- **Assisting with Emergency Medicaid planning. It is never too late to protect family assets from nursing care spending. Even if you have done no planning and a move to a nursing home is imminent or has already happened, we can still use our time tested emergency planning techniques to protect 10's or 100's of thousands of dollars of assets for the spouse at home or for future beneficiaries.**

<u>What Doug enjoys about his Elder Law practice</u>: Helping clients to protect hundreds of thousands of dollars when they thought they just had to systematically spend it on nursing care until it was all gone.

Practice Areas

- **Elder Law Solutions (R)**
- **Trust, Estate & Wealth Preservation**

- Trusts and Estate Administration

Education

- Widener University School of Law, J.D. (1995)
    - Recipient, American Jurisprudence Award in Business Organizations
- Dickinson College (1992)
    - B.A., History and Political Science

Admissions

- Supreme Court of Pennsylvania (1995)

Memberships

- Chester County Bar Association
- National Academy of Elder Law Attorneys

Publications

- Pennsylvania Nursing Home Guide – Medicaid Planning and Division of Assets
- Guide to Understanding and Protecting a Nursing Home Resident's Rights