



March Newsletter!

by Endy Ukoha-Ajike



Welcome to our March Newsletter! Almost one full quarter down in 2016 and tax time is here. Get up and spur yourself to action if you haven't done some of the things on your to do list for 2016.

I am dedicating this month's Newsletter solely to the new "Transfer on Death" Deed in California that came into effect January 1, 2016. Our March seminar will also be exclusively on this topic because of the newness and importance of this law. Make your reservation now to learn about how it affects your property transfer.

~Endy

Transfer on Death Deed: New Law in California

The Transfer on Death (TOD Deed) transfers your

Upcoming Events



- March Seminar- Transfer on Death Deed: New Law in California

Join us for our next free seminar on **Transfer on Death Deed**. Learn more about this new CA Law and how it affects you and your assets. Wine and cheese included!

Date: Mar 31, 2016 @ 5:30pm

Location: Lungomare (Jack London Square)

[RSVP Here](#)

Contribute to the Conversation!

Our goal is to make the seminar as informative and

property to any person who you name as a beneficiary to receive it when you die. It automatically avoids probate of that property if you do not have a Will or Trust at death. However, there are other very important items to consider before you conclude that this is a suitable way to transfer your property. I will address those in our April Newsletter.

Familiarize yourself with the [TOD Form and Common Questions About the Use of this Form](#) that that the legislature has put out.

[Read More Articles →](#)

March Seminar Transfer on Death Deed: New Law in California

Catch us at our new location, Lungomare, in Jack London Square on March 31st! This month's topic, Transfer on Death Deed will cover the ins and outs of the new CA law. Though these seminars are not enough to cover every detail of the new law, it equips the trust owner, his family members who may be trustees and/or beneficiaries with important information for when they need it.

Learn About:

- Overview of the new law
- What the tax consequences are of the law

interactive as possible so please submit any questions that you have on this month's topic and Endy will address them at the seminar.

[Submit Your Questions Here](#)

2016 Seminar Co-Host Opportunity

As we launch our educational seminars in 2016, we will be joining forces with complimentary professionals who will co-present with us such as CPA's, Financial Planners, Real Estate/Mortgage Brokers, etc.

If you are interested in co-hosting a future seminar with us, please contact Megan at megan@ukohalaw.com.

Important Notices



**2015 Corporate Tax Filing
Deadline: March 15, 2016**

- How it affects your property transfer
- Answers to commonly asked questions

- March 15th is the filing deadline for Corporations to file their 2015 Corporate Tax Return.

We encourage you to [RSVP](#) for this upcoming seminar on March 31, 2016, which of course includes wine and cheese on us.

Contribute to the Conversation and [Submit Your Questions](#).

Endy's Planning Tip

It's exciting to have the new California Transfer On Death Deed as an additional planning method to transfer your property at death that will bypass Probate. However, it is advisable to consult with an Estate Planning attorney before deciding that it is suitable for you. There are tax and other consequences to its use.

We look forward to continuously working with you to resolve your required Business, Tax and Estate Planning needs in 2016. Contact us if you have any questions regarding any of the items in this Newsletter.

Share the news!



About Endy:

Endy is an Oakland (Jack London Square) based Tax & Estate Planning Attorney with over 13 years of experience. He has helped countless families throughout California develop individualized estate plans and has administered many estates over that period.

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CONTACT US:

Phone: 510.834.9944

Website: www.ukohalaw.com

Mailing Address:

70 Washington St, Suite 303

@ Jack London Square

Oakland, CA 94607

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