



January Newsletter!

by Endy Ukoha-Ajike



We are glad to welcome you back into this new year that provides for all of us new opportunities to get things done. Things that we put off doing last year. We hope you enjoyed your holidays with family, friends and loved ones.

A new president was sworn in last week. The new Congress has already started work. We promise to keep you informed on changes in the law that we know will surely come. Those changes will impact our lives and how we plan for our families, loved ones and businesses. So stay tuned. ~Endy

Another New Year, New Opportunities

Here are the most significant changes that happened last year in Estate Planning that will impact 2017:

1. Changes in Medi-Cal recovery of assets: Starting from January 1, 2017, your home or real property which is normally an exempt asset will not be

Upcoming Events

**- SEMINAR NEWS -
2017 Brings New
Guest Speakers,
Content, Schedule and
Location!**

Our seminars will now be held on a bi-monthly basis at our cozy office in Jack London Square. Mark your calendars!

2017 Seminar Dates:

- Thursday, February 23rd
- Thursday, April 27th
- Thursday, June 22nd
- Thursday, August 24th
- Thursday, October 26th

Time: 6:15pm-8pm

Doors Open @ 6:15pm

Presentation @ 6:30pm

New Location:

Ukoha-Ajike Law Group
@ Jack London Square
70 Washington St, Suite 303
Oakland, CA 94607

Contribute to the

subject to a Medi-Cal recovery lien as long as it is transferred to a Revocable Living Trust if the owner was on Medi-Cal during her/his lifetime.

2. From January 1, 2016, you can also now transfer certain real property assets to your beneficiaries through a Transfer on Death Deed (TODD). This bypasses Probate.

3. The new administration in D.C. is promising to repeal the Affordable Care Act (ACA) “affectionately” called Obamacare. When that happens, we will provide information on how it affects our small business clients, and Medicaid recipients.

4. Estate Taxes: The new administration has also promised to repeal the Estate Tax, “affectionately” dubbed the “Death Tax”. It is levied on the net value of an estate that is over a threshold figure of \$5.49M per individual who dies in 2017, up from \$5.45M in 2016.

This is just a tiny sampling of the issues we shall be dealing with this year and beyond. So be on the lookout.

2017 Seminars Move to the Ukoha-Ajike Law Group Office in Trendy Jack London Square

We are excited to announce that our seminars will now be held at our office on a bi-monthly basis. We will continue to meet on the 4th Thursday evening of the month and bring you engaging guest speakers to present on critical topics.

It is now more important than ever to attend and

Conversation!

Our goal is to make our seminars as informative and interactive as possible. Please let us know if there is any topic you would like to hear about an upcoming seminar.

[**Submit Your Topic Here**](#)

**- February Seminar -
Business Formations,
Accounting and Tax
Tips for Filing**

Join us at our office for our next free seminar with **Guest Speaker: Anna Koltunov, Tax Accountant.**

Wine and appetizers included! Space is Limited. Reserve your spot to attend.

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[**Register Here**](#)

Important Notices

gather FREE information, sip on your glass of wine, and make the right decisions on planning for your business, loved ones and family. Take advantage of this and attend our first seminar of 2017 on Thursday, February 23rd.



Endy will be speaking on business formations and entity selection (C-Corporations, Limited Liability Companies (LLC), S-Corporations, Partnerships and Sole Proprietorships). Our guest speaker Anna Koltunov, an accomplished tax accountant, will be speaking on all things related to your business and personal taxes to help prepare you to file your tax returns way ahead of time. Space is limited, guests must reserve their spot to attend. [Register Here](#).

Personal Income Taxes Due

- Personal income taxes are due on April 17, 2017.

Endy's Planning Tip:

- If you had any life altering events during the holidays, it is time to update your Estate Plan.

Share the news!



Share



Forward



Share

About Endy:

Endy is an Oakland (Jack London Square) based Tax & Estate Planning Attorney with over 16 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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