Connelly Law Offices, Ltd.
Elder Law Attorneys

Connelly Law is an elder law firm that specializes in estate planning and probate law, as well as a variety of fiduciary services. To ensure that our clients' assets are not only protected throughout their lives, but after they pass away as well, our firm helps clients create clear and concise estate plans designed to protect your assets.

For clients who are facing probate regarding a loved one's estate, we have the ability to assist them throughout the entire process. We also have the ability to help elderly clients who wish to plan for retirement, need fiduciary assistance, or need representation during an elder exploitation case.

We offer our clients the highest quality of legal representation and are licensed to practice before the Rhode Island, Massachusetts, Connecticut, and Federal Bars.

855-724-9400

www.connellylaw.com

RJ Connelly III

Attorney and Counselor at Law

Certified Elder Law Attorney
Member National Elder Law Foundation
Member National Academy of Elder Law Attorneys

RJ Connelly III has been recognized with many honors for outstanding achievement in legal representation, client service and client satisfaction. These awards include:

- 2017 Lawyer's of Distinction "**Estate Planning Award**"
- 2016-2017 Who's Who for **"Top Attorney's of North America"**
- 2016 **"10 Best Estate Planners"** by the American Institute of Legal Counsel
- 2016 **"Elder Lawyer of the Year"** by Lawyer's Monthly Magazine
- 2011 Alliance for Better Long-Term Care's **Hero Award**

Whether you're a successful business owner in the prime of your career, looking to sell or manage real estate, someone who needs help managing monthly assets, downsizing or paying bills, Connelly Law's wealth management team can help you reach your goals.

Rhode Island Office
372 Broadway
Pawtucket, Rhode Island 02860-2860
401-724-9400

Connecticut Office
60 Willow Street
Mystic, CT 06355
855-724-9400

Disclaimer: Certified Elder Law Attorney, as designated by the National Elder Law Foundation is the only organization approved by the American Law Association to offer certification in the area of elder law. Rhode Island, Connecticut and Massachusetts courts license all lawyers in the general practice of law. These courts do not license or certify any lawyer as an expert or specialist in any particular field of practice.

Connelly Law Offices, Ltd.
Wealth Management

Elder Services
Attorney-in-Fact Services
Court Appointments
Budget Management
Real Estate Sales
Rep Payee Services
Asset Protection
Accountings and Inventories
Bill Paying Services
Trustee Services

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Connelly Law's Total Wealth Management

A substantial part of Connelly Law's practice involves us serving as a fiduciary in matters such as the trustee of complex trusts, act as attorney-in-fact under power of attorney, administrators of probate estates and as conservators.

Other fiduciary services we provide include:

- Paying bills and keeping detailed financial records, filing taxes and maintenance agreements
- Assistance with the estate planning documents and services performed as an attorney-in-fact for financial and healthcare decisions
- Confirm accuracy of provider bills
- Consolidating, transferring and closing accounts
- Preparation of probate inventories and accountings, trusts and power of attorney
- Partnering with accountants to prepare and file all required income tax documents/returns
- Paying nursing home, medical and other bills
- Verify third-party calculations, such as pension payments, insurance payments, and other annuity payments
- Secure, monitor, sell and manage all real estate assets
- Coordinate with accountants and investment professionals
- Insurance administration including health, automobile, homeowner's, personal property, liability and long-term care programs
- Federal Rep payee services for VA and SSA
- Medicare benefits and Medicaid planning
- Serve as court appointed guardian to manage and protect the financial needs of incapacitated adults

Estate Planning

Our clients cover the spectrum from individuals receiving state aid to those with assets of several million dollars. Working directly with the client and, where appropriate, the client's family and accountants, it is our goal to provide sound tax and business planning advice and to create an estate plan that achieves the client's goals in a manner that minimizes the time and expense of estate administration.

Maximizing Your Retirement

Drawing on our wealth management and elder law expertise, we can advise you on even the most complicated issues regarding the effective distribution of your retirement assets.

Disabled Children

For disabled children, long term care planning is an important part of your wealth management plan and we design strategies to help with your child's long term financial and health needs.

Real Estate Purchases and Sales

Connelly Law's total wealth management plan often include real estate. With an experienced real estate broker on staff we regularly arrange for purchasing, selling, mortgaging or refinancing of homes, condominiums and business properties. We also assist with intra-family transfers, co-ownership agreements, trust and inheritance planning for real estate.

Our services include:

- Preparing and processing purchase contacts, deeds, leases, mortgages and other documents
- Preparing and filing necessary transfer tax returns and requirements for real estate transactions
- Attending the closing at which all deeds, legal documents and checks are exchanged

Asset Protection

Asset preservation is a strategic process involving multi-level planning. The importance of integrating asset protection as a part of your overall wealth management plan to fully protect and preserve your assets cannot be overstated.

By itself, even the most sophisticated plan may not protect your wealth against the many unforeseen events and economic threats that exist today such as the high cost of long term care.

Our approach of integrating estate plans with asset protection strategies helps our clients recognize the potential exposures that they and their beneficiaries may have and the role that effective advance planning plays in reducing or even eliminating these threats.

We ask, we listen and we deliver solutions that ensure that your financial goals are realized and that your assets are protected.

Experts You Can Trust

We know that all financial decisions are interrelated. It's reassuring to know that with Connelly Law, you have access to experts who can anticipate how each financial decision impacts your entire financial picture, including your short and long term goals.

Call Connelly Law Today!

Isn't it time you explored what's possible with a wealth management attorney experienced in elder law, estate planning, financial planning, real estate sales and management, insurance law and asset protection?

Our firm has provided Power of Attorney, Trustee and Court Appointed Guardianship services to thousands of clients with each case given personal oversight by RJ Connelly, III and his team of dedicated fiduciary professionals.

Call us today at **855-724-9400** to get started!