

Lippes Mathias' New York Attorneys Continue to Service Their Clients' Trust & Estates Needs

April 8, 2020 | **CLIENT ALERTS**

There is no doubt these are unprecedented and challenging times. The health and safety of our employees and clients are our highest priority, and we remain committed to providing clients with the same best-in-class legal service they are used to receiving. However, COVID-19 makes in-person meetings with clients to discuss, review, and sign documents very challenging. To address these new issues, we have made strategic enhancements to our processes and technology to ensure clients can get their estate planning documents prepared and executed during this time of social distancing and the work-from-home mandate.

Due to these enhancements, and based upon an individual's particular circumstance, we can be flexible enough to implement practical solutions to meet our clients' needs. For example, New York State law requires that a Last Will and Testament be executed in the presence of two disinterested witnesses. To ensure the safety of our clients, attorneys, and staff, we have implemented alternative methods of preparing and signing documents adhering to NY and federal COVID-19 guidelines which will also conform to statutory requirements. These methods include the following:

- Once you retain Lippes Mathias, your attorney will contact you via videoconference (e.g., Zoom which is compatible with most smartphones, tablets, and computers), telephone, or email, based upon your preference. After you and your attorney have thoroughly discussed your wishes, your attorney will prepare your estate plan and send the documents for your review either electronically, or if preferable, via postal mail. Afterward, you and your attorney can discuss any revisions or comments by telephone, email, or videoconference.
- After you have reviewed and approved these documents, your attorney will finalize them and schedule a signing ceremony to complete your estate planning. Our attorneys will coordinate with you on how to either find two disinterested witnesses or, if you are unable to locate witnesses, we will coordinate obtaining witnesses for the ceremony. On April 7, 2020, New York State Governor Andrew Cuomo issued Executive Order 202.14 which now provides an alternative means of how a Will can be executed by the two disinterested witnesses through the use of videoconferencing. A prior Executive Order (202.07) already allowed for virtual notarization of documents, which can be implemented when preferable.
- An attorney from our office will oversee the execution of the documents, taking into account the most recent guidance from New York and the federal government to avoid any unnecessary health risks, and ensure legal compliance.

Although these are uncertain times, our attorneys are prepared to guide you through the planning process to ensure we capture your wishes and protect your future.

Please contact any of our Trusts & Estates attorneys to assist you with your New York State estate planning needs.

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