

WORDS TO THE WISE

July 2007

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Of Counsel*

LANCE MCKINNEY
Certified Elder Law Attorney

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*Certified Elder Law Attorney
Certified Circuit Civil Mediator*

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Elder Law Attorney

If you have clients who need assistance with finding the right place for their ill family member to live and determining how to pay for it, ***we can assist them with becoming eligible for Medicaid.***

If you have clients who are unable to care for themselves and make their own decisions, ***we can assist their loved ones with becoming their guardian.***

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Estate Beneficiary Scam

A client recently forwarded to our firm, a copy of a letter that was sent to them from an alleged attorney. The letter claims that its recipient may be the beneficiary of a sizable estate, but must act within 21 working days to prevent the bank from deeming the account “unserviceable.” The letter tells the story of an Italian citizen who died without heirs. Its author requests the consent of the recipient to present them as the next of kin. No doubt, if the recipient responds to the letter, personal information will be requested to “prove” that they are entitled to the inheritance. This is an example of an “Advance Fee Scheme.” If you or anyone you know receives a letter like this, do not respond. If you receive an Advance Fee Scheme by e-mail, forward the e-mail to the Financial Crimes Unit of the United States Secret Service at 419fcd@uss.s.treas.gov. For more information on scams, visit www.secureflorida.org.

Beware of Travelers

The Lee County Sheriff’s Office issued a press release this month, warning the community about the dangers of hiring door-to-door contractors. According to the Sheriff’s Office, “Travelers” arrive each spring and typically claim to be roofers or pavers. They convince people to hire them by using intimidation and high-pressure sales techniques, and then charge excessive fees for poor quality work. Unfortunately, elderly homeowners are the most frequent targets of their scams. Travelers often scope out their victims in grocery stores and other public venues, and then follow them home. To protect yourself from becoming a victim of this type of scam, the Sheriff’s Office suggests that you never do business with a door-to-door contractor, always get at least three bids, do not necessarily choose the lowest bid, and insist on getting a written contract. Visit the Lee County Sheriff’s Office website at www.sheriffleefl.org for more information.

There’s a new partner in town!

The firm of Osterhout and McKinney, P.A. is pleased to announce the partnership of Beth Prather. Beth is a third generation Fort Myers resident. She received her B.A. in math and computer science from Emory University, her M.B.A. from Nova University and her J.D., cum laude, from the University of Maine. Beth’s practice concentrates on the areas of life care planning, estate planning, Medicaid planning, probate and guardianship.