

# Lidia Carr Law Offices, LLC

## Newsletter - March 2010



### **Please Beware of Unauthorized Practice of Law in Estate Planning**

Very recently the Supreme Court of Ohio decided the case of Ohio State Bar Association v. United Financial Systems Corporation. The Court determined that the Company, United Financial Systems, engaged in the unauthorized practice of law related to the preparation, marketing and sale of various estate planning documents.

More than 2,000 Ohio residents purchased estate planning documents from the Company. Unfortunately, these estate planning documents may be of doubtful utility.

The Court stated that United Financial Systems had ceased the marketing and sale of estate planning services. The Court ordered that the Company bear the cost of written notice to be provided to all persons who received its services.

Finally, the Court urged the clients of United Financial Systems to contact an attorney of their choosing who is not affiliated with or paid by the Company for the purposes of reviewing or modifying their existing estate planning documents, or preparing the new ones.

### **IRS Circular 230 Notice**

To the extent that this message, and/or any attachments, concern tax matters, they are not intended to be used and cannot be used by you for the purposes of avoiding penalties that may be imposed by law.