Nora Gieg Chatha, Esq.
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(412) 594-3940

Nora has been certified as an Elder Law Attorney by the National Elder law Foundation and represents individuals, fiduciaries and healthcare providers in all areas of estate planning and wealth preservation, with a focus on special needs, public benefits and long-term care related issues.

Nora is well equipped to advise clients in asset protection, tax minimization, special needs, public benefits, elder law, long-term care, and end of life planning. Past experience as legal counsel with the Pennsylvania State Medicaid (Medical Assistance) Agency, the Department of Human Services (formerly Public Welfare), knowledge of Orphans' Court practice and fiduciary duties allows Nora to provide comprehensive representation to clients in a variety of complex situations.

Jennifer Bittel Derby, Esq.
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(412) 594-3936

Jennifer is an elder law attorney and works with families and individuals to assist in the development of estate plans, estate and trust administration and special needs planning. She assists clients with long-term care planning, including Medicaid eligibility, asset protection planning, and discussion and evaluation of care options and payment for long-term care.

Jennifer's estate planning practice includes both personal and business planning, and in that capacity, she drafts Wills, Financial and Healthcare Powers of Attorney, and Trusts. Jennifer also assists clients with public benefits planning and eligibility and special needs planning, including drafting of special and supplemental needs trusts. Additionally, she represents clients in guardianship proceedings, and handles all aspects of estate and trust administration for clients.

Jennifer also works with small business clients with initial set up of their business entity and advises business clients regarding business succession planning and estate planning matters related to business assets.

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Estates and Trusts Practice

The firm's Estates and Trusts practice provides estate and financial planning, estate, trust and guardianship administration, and Orphans' Court litigation. Our attorneys structure estate and financial plans to carry out clients' wishes concerning the transfer of their assets. We counsel clients on how to minimize the tax costs associated with their plans.

Estate Planning & Administration

- Wills for those in all stages of life, marital status, and wealth accumulation.
- Tax planning-federal estate, gift, and generation skipping tax, Pennsylvania inheritance tax, related income tax.
- Planning after the repeal of DOMA provisions.

Special Needs

- Guardianships.
- Handling personal injury awards and settlements.
- Special and Supplemental needs trusts.
- Medicaid (Pennsylvania Medical Assistance).
- Qualifying and maintaining eligibility for public benefits.
- Gifting strategies.
- Remedying poorly planned bequests.

Lifetime Planning

(planning for incapacity from accident or illness)

- Financial powers of attorney.
- Health care proxies (health care powers of attorney).
- Living wills (advance directives).

Trust Planning & Administration

- Revocable trusts (living trusts).
- Minors' and young beneficiary trusts.
- Education trusts.
- Irrevocable life insurance trusts.
- Dynasty or generation skipping trusts.
- Spousal trusts, Asset protection trusts, Charitable trusts.

Retirement Asset Planning

- Beneficiary designation planning.
- Trusts for retirement assets/Stretch IRA planning.
- Spousal and non-spousal rollovers of IRA's.
- Options for inherited IRA's.

Elder Care

- Financial and medical powers of attorney.
- Guardianships.
- Qualifying and maintaining eligibility for public benefits (Medicaid or Medical Assistance).
- Supplemental Social Security Income (Social Security Disability).

Estate Administration

- Probate of the will.
- Preparation of probate filings (inventory, notices, and others).
- Preparation of tax returns for income, Pennsylvania inheritance, and federal estate and gift taxes.
- Collection, management, and distribution of assets.
- Compliance with tax, accounting, and other requirements.

Trust Administration

- Duties and responsibilities of the trustee.
- Beneficiary rights.

Trust Administration (cont.)

- Compliance with tax, accounting, and other requirements.
- Preparation and filing of trustee accounts.
- Preparation of fiduciary trust income tax returns.
- Advising on requirements of fiduciary investment.
- Regulatory matters for corporate fiduciaries.
- Preparation of non-judicial settlement agreements.
- Preparation of modification of trust agreements.

Orphans' Court Litigation

- Initiating and defending will challenges.
- Disputes involving estates and trusts.
- Executor and Trustee account filings.
- Guardianship proceedings for minors and incapacitated persons.
- Cemetery trust triennial account filings.

Charitable Planning

- Charitable trusts.
- Charitable annuities.
- Maximizing tax benefits of charitable giving.
- Formation of private foundations.

Business Succession Planning

- Multi-generational planning.
- Transfer of ownership/ management .to younger generations.
- Buy-sell agreements, funding for succession plans.
- Management succession planning.
- Planning for sale of business.
- Estate and business succession planning required by lenders.

ESTATE PLANNING

Who needs to plan? Everyone needs to create an estate plan that ensures that those who depend on them will be protected if death or incapacity strikes. Estate planning is NOT just about your assets, particularly for those who have a special needs loved one.

Why plan? Plan for the ones you love - your spouse, children, and grandchildren. Plan for your own peace of mind. Planning can identify potential problems before they happen and solve them, so your loved ones are not left dealing with problems you did not know you had. Planning for a special needs loved one can help to ensure financial and personal security upon death or incapacity. A sound estate plan is designed to ensure a legal representative is appointed for your loved one to assume the advocacy role you previously served and to leave assets in a secured manner to avoid a disruption or loss of means -tested public benefits.

When to plan? Now. Before it's too late. A little preparation and planning can avoid complications later on and provide you and your loved ones with peace of mind. Planning should also be reviewed on a periodic basis to address any changes in your personal circumstances or applicable law.