



Joseph B. Mathis
Principal, Columbia Office

PRACTICE AREAS

- Elder Care Planning
- Elder Law
- Estate Administration
- Estate Planning
- Estates and Trusts
- Guardianships

EDUCATION & ADMISSIONS

- J.D. (cum laude), University of Baltimore School of Law, 2012
- B.S. (magna cum laude), Towson University, 2007
- Maryland

ACTIVITIES

- Maryland State Bar Association
- American Bar Association
- National Academy of Elder Law Attorneys

PRACTICE FOCUS

Mr. Mathis primarily focuses his practice in the areas of estate planning, estate administration, and elder law. Mr. Mathis believes that everyone should have a well-structured and carefully thought out plan for disability and death. As a result of this philosophy, Mr. Mathis has built his practice by representing a wide range of clients, including parents with young children, parents with special needs children, business owners, retirees, elderly individuals, and others.

A good part of Mr. Mathis' practice is spent guiding his clients through the complex issues and challenges that exist with elder care planning for their family members who are aging, and concerned about dealing with care needs and disabilities. Mr. Mathis advises his elder law clients about how to best protect their assets and qualify for benefits that may be available to assist with the payment of caregiving expenses.

Mr. Mathis is also very experienced with the probate process and in the administration of estates and trusts. He frequently represents personal representatives, trustees, and beneficiaries through the course of the administration of an estate or trust.

The following are examples of some of the matters that Mr. Mathis has handled:

- Prepared estate planning documents for clients with young children, which appoint a guardian for their children and establish trusts for their children so that their children's inheritance will be managed for their benefit by the person the clients selected, until the ages that the clients believe their children will be responsible enough to manage their inheritance on their own.
- Structured a special needs trust to receive a special needs child's inheritance so that the child will be able to obtain certain government benefits and any balance remaining in the trust will be distributed to the child's siblings, instead of being paid back to the government.
- Advised retired clients on structuring their estate plan so that their individual retirement accounts will be distributed in the most tax-efficient manner.
- Assisted elderly clients with establishing and funding an irrevocable trust for the benefit of their children so that any funds in the trust will be protected from the clients' possible nursing home care costs in the future.
- Guided a client through the process of obtaining long-term care medical assistance coverage for her husband to cover the cost of his nursing home care, and ensured that her house and a majority of their assets were protected for her benefit.
- Represented a client in becoming the guardian of her father who has dementia, so that she can now manage his finances and make healthcare decisions for him.

If you would like an experienced attorney to represent you in one of these areas of law, or even if you think you may have some other legal need, Mr. Mathis welcomes your calls and is happy to discuss your specific situation with you.

AWARDS



- Super Lawyers Rising Star, 2019
- Super Lawyers Rising Star, 2018
- Super Lawyers Rising Star, 2017
- Super Lawyers Rising Star, 2016
- Super Lawyers Rising Star, 2015

"I do not believe in a "one size fits all" approach to planning. I take time to learn my clients' needs and objectives, and then develop a plan that is customized for their unique situations."

— Joseph Mathis



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