

CLIENT AND FRIEND NEWSLETTER

January 2025

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LAW OFFICES OF
BETH A MCDANIEL
Professional Limited Liability Company

OOPS, THEY DID IT AGAIN (OH BOI!)

BY BETH A MCDANIEL, JD, CELA

In our December 2023 and October 2024 newsletters, I wrote about the looming January 1, 2025, deadline under the Corporate Transparency Act to report beneficial ownership information (BOI) to the federal government through...

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ADDING BACK LEGAL SERVICES TO SERVE YOU BETTER



With the additions to our staff, I am pleased to announce we are once again offering legal counsel regarding long-term care issues and are accepting new guardianship/conservatorship cases. With the pandemic, and resulting staffing

challenges, we paused offering long-term care legal assistance. I am happy to report that we now have the capacity to assist and provide guidance to clients regarding their long-term care associated issues, including Medicaid eligibility.

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EMPLOYEES SPOTLIGHT – WATCH US GROW!



It gives me pleasure to kick off the new year by introducing our newest team members:

Associate Attorney – Sydney Sherman

Paralegal – Yvonne Smith

Paralegal – Christine Wang

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CONT: ADDING BACK LEGAL SERVICES TO SERVE YOU BETTER

Beginning in 2021, Washington state adopted new guardianship and conservatorships laws. With the difficulties created by counties' different interpretations of the new laws, along with post-pandemic staffing challenges, it became challenging to take on new cases while ensuring that our ~100

existing clients remained compliant (see related article in our April 2024 Newsletter). Thus, we temporarily paused taking new guardianship and conservatorship cases. We now have the capacity to take new and existing cases in King County, along with Kitsap and Pierce Counties.

CONT: OOPS, THEY DID IT AGAIN (OH BOI!)

...the U.S. Department of the Treasury's Financial Crimes Enforcement Network (FinCen) and that the results of not reporting are civil fines of \$591.00 (\$500.00, with an inflation adjustment) per day and criminal penalties for false reporting.

Due to significant related legal activity in December, including an injunction entered by a federal court based in Texas on December 3, 2024, the Fifth Circuit Court of Appeals motions panel lifting the

injection on December 23, 2024, and the resulting extension of the filing deadline to January 13, 2025, I thought it was important that I pause my family time in snowy Leavenworth and send out a bulletin to our friends and clients alerting them to these legal developments. Thus, I pulled out my laptop just long enough to draft an article.

You can imagine my surprise when I returned to work on December 30 to

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learn that, in an apparent unusual move, on December 26, the injunction was reinstated by the Firth Circuit Court of Appeals' merits panel. Per the merits panel, "[i]n order to preserve the constitutional status quo while the merits panel considers the parties' weighty substantive arguments, that part of the motions-panel order granting the Government's motion to stay the district court's preliminary injunction enjoining enforcement of the CTA and the Reporting Rule is VACATED." Oral argument in the trial is scheduled to begin March 25, 2025.

In short, there is no current requirement for non-exempt companies to report beneficial ownership information (BOI) to FinCen. I will pass on the final ruling once it is announced as, although an estimated 32.6 million private companies are affected by this potential reporting requirement, it does not appear to have the media's attention. It will be interesting to see if there is a determination that the reporting requirement is unconstitutional or whether new BOI reporting deadlines are announced.

CONT: EMPLOYEES SPOTLIGHT – WATCH US GROW!



Associate Attorney – Sydney Sherman

Sydney has been a part of the firm since July 2024. She is an experienced attorney specializing in estate planning, probate, trust administration, guardianship, and Medicaid planning. In 2019, Sydney earned her Juris Doctor with honors in Business Law..

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and recognition for her pro bono work. Before focusing on estate planning, she gained valuable experience in healthcare provider and insurance defense litigation. A Southern California native, Sydney has practiced in Washington State for the past three years and considers the Seattle area home.

In her free time, Sydney enjoys hiking, snowboarding, and spending time with her family

Sydney can be reached directly via email at sydney@bethmcdaniel.com or (425) 296-6944.



Paralegal – Yvonne Smith

Yvonne joined the firm in December 2024. She earned her paralegal certification with honors at UCLA with a focus on real estate and contract law. Since 2019, she has specialized in the areas of probate and estate planning. She enjoys building

strong relationships with clients who are navigating the probate process.

Another Southern California native, Yvonne currently lives in Maple Valley with her husband and two dogs. She has two adult children and loves spending time with her family and exploring the beautiful Pacific Northwest.

Yvonne can be reached directly via email at yvonne@bethmcdaniel.com or (425) 496-6677.

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Paralegal – Christine Wang

Christine also joined the firm in December 2024. She earned her law degree at Michigan State University College of Law in 2022 and has bachelor's degrees in political science and human resource management from Northern Illinois University. Christine has

experience working for the courts as a judicial law clerk. Christine will sit for the February bar exam. Her practice areas will include estate planning, Medicaid planning, and guardianship.

A native Midwesterner, Christine relocated to Seattle in 2023 and is quickly putting down roots with a new house purchase and her January 3, 2025, wedding. In her free time, she enjoys cooking, baking, and playing video and board games with family and friends.

Christine can be reached directly via e-mail at christine@bethmcdaniel.com or (425) 496-3153.

If have questions or wish to make an appointment, please contact our client care coordinator, Margo Passeau, at (425) 296-3121 or margo@bethmcdaniel.com.

Disclaimer: this newsletter is informational only and should not be construed as legal advice.
