



## Norman ("Gene") E. Richards

Shareholder

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Gene counsels and represents clients on personal and business matters concerning estate planning (wills, trusts and powers of attorney), estate taxes, elder law and disability planning, probate and trust administration, real estate, and business formation and succession planning.

Gene works with families to design trusts, wills and powers of attorney. These documents preserve and distribute family assets in the most appropriate way during a person's lifetime and after death. He appears in probate court to establish guardianships and conservatorships and to enforce wills and trusts. He also helps families avoid estate and gift taxes on the transfer of their assets during life and at death through tax planning techniques. He advises and represents surviving family members in administering trusts and estates, including probate procedures and preparation of estate tax returns, and representation before the IRS.

He compassionately guides families who are planning for long term care and who need to maximize financial resources to pay for the care. He also prepares specialized legal documents for those who have children with special needs to help provide for a disabled child's care while preserving their eligibility for government benefits. These are just some reason that Gene is a highly sought after estate planning attorney in Detroit.

Gene provides community leadership as a director and officer of the Greater Farmington Chamber of Commerce and as a commissioner on the Farmington Area Commission on Aging. He also volunteers as a legal advisor to seniors through the Farmington Hills Costick Center as well as facilitates an Affinity Group for Walsh College Business Leadership Institute. He is a frequent lecturer with organizations such as the Institute of Continuing Legal Education, Lorman Education Services, the Alzheimer's Association of Southeast Michigan and private

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### **PRACTICE AREAS**

Estate Planning  
Entity Selection, Organization & Planning  
Elder Law  
Trust & Estate Administration  
International Business & Trade  
Trust & Estate Litigation  
Business Succession Planning  
Trusts & Estates

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### **EDUCATION**

Wayne State University Law School,  
J.D., 1996  
Free Will Baptist Bible College, B.A.,  
1990, *magna cum laude*

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### **BAR AND COURT ADMISSIONS**

Michigan  
U.S. District Court for the Eastern  
District of Michigan  
Court of International Trade



interest groups.

Gene is also a member of the Probate & Estate Planning, Elder Law & Disability Rights, Real Property and Business Law sections of the State Bar of Michigan; the Oakland County Bar Association; the National Academy of Elder Law Attorneys (NAELA); and the American Bar Association.

### **REPRESENTATIVE MATTERS**

- Represented a large estate before the IRS that was assessed hundreds of thousands of dollars in penalties/interest due to errors of a professional tax preparer. Obtained a full refund of assessed penalties (and reduction in interest) after a two year IRS administrative appeals process.
- Obtained Medicaid eligibility for a gentleman in a nursing home using numerous legal procedures while at the same time preserving the majority of the family's investments which allowed the healthy wife to stay at home with financial security.
- Advised a client through the steps of purchasing a business. Helped the client avoid pitfalls and reduced purchase price by identifying irregularities in the Seller's accounts and valuation of the business.
- Successfully defended a child/trustee in probate court litigation against a disgruntled sibling's allegations of wrongdoing and efforts to void the parent's trust and estate plan document. Upheld enforceability of the Trust plan and carrying out of parents' wishes.
- Preserved an elderly widow from exploitation by deceptive neighbors who attempted to gain control of her assets during the period of her husband's hospice care by having the husband sign legal documents. Through aggressive intervention, thwarted the neighbors' plans, removed them from influence and control of the widow, and set up a team of collaborating professionals to assist with her financial management and care needs. Restored her dignity and preserved her independence.

### **SPEAKING ENGAGEMENTS**

**Succession Plan = Planning for Success**, *Walsh College BusinessLIVE*, October 20, 2011

**Basic Estate Planning Strategies**, *Davenport University*, March 10, 2011

**Legal Savvy Winter Warm Up**, *State Bar of Michigan*, January 15, 2011

**Estate and Legacy Planning**, *Ward Evangelical Presbyterian Church*, November 13, 2010

**Legal and Financial Issues for Persons Age 50 and Better**, *Costick Center*, October 26, 2010

**Don't Just Survive - Thrive**, *Walsh College Business Leadership Institute*, May 11, 2010

**Alzheimer's Disease: Legal and Financial Considerations**, *Federal Reserve Bank of Chicago, Detroit Branch*, April 21, 2009

**Types of Trusts**, *Lorman Education Services*, January 31, 2008

**Trust Accounting**, *Lorman Education Services*, June 2, 2006



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**PUBLICATIONS**

**Special Estate Planning Needs for Blended Families**, *Foster Swift Estate Planning Update*, November 2009

**MEMBERSHIPS & AFFILIATIONS**

**Legal Affiliations:**

- State Bar of Michigan
  - Probate & Estate Planning Section
  - Elder Law & Disability Rights Section
  - Real Property Section
  - Business Law Section
- Oakland County Bar Association
- National Academy of Elder Law Attorneys

**Community Involvement:**

- Greater Farmington Chamber of Commerce, Board of Directors
  - Farmington Hills Costick Center, Pro bono services
  - Garden City Hospital Foundation, Former Trustee
  - Alzheimer's Association of Southeast Michigan, Speaker's Bureau
  - Westland Zoning Board of Appeals, Former Commissioner
  - Ward Evangelical Presbyterian Church, Membership of 3000, Past President
  - Lorman Education Services, Lecturer
  - Farmington Area Commission on Aging, Commissioner
  - Walsh College Business Leadership Institute, Affinity Group Leader
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