

Maggie L. Sutton

713 S. Front St.
Columbus, OH 43206
(614) 443-8000

BAR ADMISSIONS

Ohio 2011
Indiana 2013

EDUCATION

Capital University Law School

Juris Doctor

- Top 25%; cum laude
- Dean's Excellence Scholarship
- Order of the Curia, 2011 Class Captain

Indiana University, Kelley School of Business

B.S. in Business (Accounting) with Spanish minor

EXPERIENCE

Law Office of Richard T. Taps – Columbus, Ohio

Senior Associate Attorney (August 2011 – Present)

- Advise clients on VA and Medicaid eligibility
- Formulate and implement plan for VA and Medicaid eligibility
- Draft legal documents associated with plan for VA and Medicaid eligibility
- Draft legal estate planning documents, including powers of attorney, advanced directives, wills, trusts, deeds, affidavits
- Draft probate court documents to assist in estate administration, guardianships, and other probate matters
- File probate documents with various county probate courts
- Manage support staff, including task assignments and review of work production

RSM McGladrey, Inc.(fka American Express Tax and Business Services) – Chicago, Illinois

Real Estate Tax Accountant (August 2006 – July 2008)

- Prepared and filed corporate, partnership, trust, gift, and individual income tax returns
- Researched laws and regulations to better serve clients
- Performed first review of tax returns prepared by new associates and interns
- Analyzed and prepared quarterly and/or transaction projections for estimated tax purposes
- Annual billable hour requirement of 1850. Met and exceeded each year of employment.

SPEAKING ENGAGEMENTS/PUBLICATIONS

Ohio Forum for Estate Planning Attorneys, Wealth Counsel – Columbus, Ohio, *Recent Changes and Updates to Medicaid*

February 5, 2016

OSU James W. Pyle Caregiver Symposium – Columbus, Ohio, *Legal and Financial Concerns for the Dementia Caregiver*

January 16, 2016

Alzheimer's Association Caregiver Support Group – Worthington, Ohio, *Money Matters: Legal and Financial Concerns for the Alzheimer's Caregiver*

December 4, 2015

Ohio Medicaid Manual Seminar – Columbus, Ohio

October 1-2, 2015

- One of two featured speakers, co-author of portions of the manual
- Intermediate/Advanced course for attorneys regarding Medicaid eligibility and planning techniques
- Presented on topics such as Community Spouse Monthly Income Allowance, Patient Liability, Durable Power of Attorney, Planning Strategies for Single Individuals and Married Couples, VA Aid & Attendance Benefits

National Business Institute – Worthington, Ohio, *Understanding Tax Procedures to Avoid Problems Later*
December 15, 2014

Estate Planning, Professionalism and Ethics Seminar – Mt. Vernon, Ohio, *Qualifying Income Trusts; Wacky World of Medicaid: Contradicting Case Law*
November 19, 2014

Ohio Assisted Living Association – Columbus, Ohio, *Miller Trusts: A Tool to Help AL Residents Qualify for Medicaid.*
April, May, June 2014

Ohio Medicaid Manual Seminar – Columbus, Ohio
December 5-6, 2013

Ohio State Bar Association Annual Convention – Cleveland, Ohio, *Medicaid Case Law Update*
May 8-10, 2013

MEMBERSHIPS AND ASSOCIATIONS

- National Academy of Elder Law Attorneys (NAELA)
- Ohio State Bar Association
- Columbus Bar Association
- Women Lawyers of Franklin County (member of Networking Committee)
- Worthington Estate Planning Council