Barley Snyder

William R. Blumer, CELA (Certified Elder Law A

Partner

Office: Reading, PA

Email: wblumer@barley.com

Tel: Tel: (610) 370-8107

OVERVIEW:

Bill is a member of the firm's Trusts & Estate and Elder Law groups, concentrating his practice in the areas of elder law, estate planning, estate administration and fiduciary litigation. He is one of only approximately 65 attorneys in Pennsylvania certified in elder law by the National Elder Law Foundation. Part problem solver, advocate and family counselor, Bill's practice combines an understanding of government benefit programs, tax law, business law, debtor/creditor issues, trust and estate law, and litigation. His role is to help families navigate the myriad of legal and emotional obstacles to successfully achieve their long-term care and retirement planning goals.

Elder Law

Bill's elder law practice involves advocating for older adults and guiding them through complex government bureaucracies like Medicare, Medicaid and Social Security benefits. He works with a wide variety of clients from those with very limited means to those with substantial wealth. He routinely helps clients protect assets from being depleted by the cost of long-term care. This includes helping clients establish asset protection trusts and utilize Medicaid-compliant immediate annuities. Bill drafts customized family caregiver agreements that help families protect assets and provide superior care to loved ones. He also helps clients successfully apply for Medicaid benefits by walking them through the application process and representing them in administrative appeals when their benefits are denied or reduced improperly. Most importantly, Bill excels in explaining complex issues in ways his clients understand and helps them feel confident in the decisions they make.

Estate Planning

Bill's estate planning practice includes drafting complex documents like revocable trusts, asset protection trusts, wills, powers of attorney, family limited partnership agreements, charitable remainder trusts, and dynasty trusts for high-net-worth clients. He is thoroughly versed in the tax issues that impact estate plans, including federal estate, gift and generation-skipping transfer taxes, the income taxation of retirement plans and the business taxes that apply to corporations, partnerships and limited liability companies. Business succession planning for family businesses is a common component of Bill's practice. Early in his career, Bill assisted clients with a variety of corporate matters including business formations, mergers and acquisitions, and business financing. This experience dovetails with his estate planning work.

Estate and Trust Administration

Bill represents executors and trustees and helps them administer estates and trusts properly. For estates, this means he takes a hands-on approach to completing the estate's work, thereby relieving the executor from most of the estate administration work. This includes preparing the inventory, inheritance tax return, and estate tax return along with all other documents required by the register of wills. He also reviews fiduciary income tax returns and the decedent's final lifetime tax returns. Bill oversees the preparation of the estate accounting and communicates with beneficiaries to keep them updated on the status of the estate's administration. Although most estates are closed informally with a family settlement agreement, he also handles formal court adjudications before the Orphans' Court when it's necessary to resolve disputes associated with the administration.

When representing trustees, Bill counsels them on all aspects of their position including developing an appropriate investment plan, maintaining financial records, and properly exercising their discretion when making distributions. Occasionally, Bill also represents trust beneficiaries who have concerns about a trustee's performance and works to develop an amicable resolution of those concerns.

Fiduciary Litigation

Sometimes amicable resolutions are not possible. In those instances, Bill works with the firm's litigation attorneys to advocate for the rights of beneficiaries and fiduciaries. This includes bringing or defending will contests, surcharge actions against fiduciaries and objections to fiduciary accountings. This work also includes appointing guardians for incapacitated individuals and helping guardians file their annual reports with the court.

As a Certified Elder Law Attorney, Bill works with compassion and sincerity. He prides himself on being able to relate to his clients and is more "cardigan and corduroy than pinstripes and power ties." Bill listens empathetically, explains clearly, and helps clients see how legal, medical, and emotional issues converge and intertwine in their lives.

EDUCATION:

- Penn State Dickinson Law, J.D.
- Villanova University Charles Widger School of Law, LL.M. in Taxation
- Bucknell University, B.A., cum laude

ADMISSIONS:

- Pennsylvania

PRACTICE AREAS:

- Trusts & Estates
- Elder Law

COMMUNITY INVOLVEMENT:

Pennsylvania Association of Elder Law Attorneys

Secretary

Easterseals Eastern Pennsylvania

Chair of the board of directors

Berks County Bar Foundation

Board member

Berks Encore

Former chairman of the board of directors

Berks County Chapter of the American Red Cross

Former board of directors

Reading Symphony Orchestra

Former board of directors

Yocum Institute for Arts Education

Former board of directors

Circle of Life Coalition

Former board of directors

Community Justice Project

Former board of directors

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RECOGNITION:

- Pennsylvania Super Lawyers (2010-2012, 2020-2022)

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