

# Joseph P. Mattera

**Elder Law ♦ Estate Planning ♦ Probate Law ♦  
Special Needs Planning ♦ Guardianships ♦  
Long Term Care Planning**



**PICKREL  
SCHAEFFER AND  
EBELING**

A Legal Professional Association

A Shareholder with the firm, Joe has nearly 25 years experience (in Ohio and New York) assisting clients of all ages with developing an estate plan that best suits their needs.

Using his elder law experience, Joe represents clients facing long-term care issues. He works with family members to develop asset protection strategies, and advises them on government benefits that might pay for long term care costs, such as Medicaid and Veteran's Administration benefits.

Joe also has experience working with families facing disability issues. He creates various Trusts for disabled clients to help preserve family assets from exorbitant medical bills, while allowing the family assets to remain available for the benefit of the disabled person.

When families are faced with the need to appoint a guardian for a loved one, Joe assists in administering the guardianship proceeding in Probate Court. He also advises the guardian about compliance issues on an ongoing basis.

With his estate planning experience, Joe works with clients of all ages to assure the clients' intentions are carried out in their estate plans. This includes advice on issues that have to do with tax, business, legal, and long term care. Joe also effectively and efficiently administers probate estates for families, easing their stress during highly emotional times.

Joe has had several articles about elder law, estate planning, and probate issues published in many local papers such as The Dayton Daily News, Dayton Business Journal and Local Community newspapers. In addition, Joe has made numerous presentations on the subjects of elder law, estate planning, probate and trust law at local retirement facilities and for other community groups throughout the Greater Dayton area.

#### **Awards & Recognitions:**

Accredited Attorney with the  
Department of Veterans Affairs

Best Personal Wealth Manager, Cincinnati Magazine, 2009  
Martindale – Hubbell Peer Review BV Rating

#### **Bar Admissions:**

New York, 1987  
United States Tax Court, 1996  
Ohio, 2003



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#### **Professional & Community Activities:**

- ♦ Dayton Bar Association Estate Planning, Trust and Probate Committee
- ♦ Ohio State Bar Association Elder Law Committee
- ♦ Ohio State Bar Association Estate Planning, Trust and Probate Committee
- ♦ National Academy of Elder Law Attorneys
- ♦ Referral Attorney for Alzheimer's Association Miami Valley Chapter
- ♦ Past Moderator, University of Dayton Osher Lifelong Learning Institute
- ♦ Past Adjunct Professor, Urbana University, Business Law

#### **Education:**

- ♦ J.D., Pace University School of Law, 1986
- ♦ B.A., Fordham University, 1983