

Keith A. Stevens, CELA

SKILLS & CERTIFICATIONS

- Certified as an Elder Law Attorney by the National Elder Law Foundation
- Significant experience in estate planning, probate, special needs, and VA benefits.
- Licensed to practice law in Ohio.
- Accredited to practice before the Department of Veterans Affairs and US Court of Appeals for Veterans Claims.

EXPERIENCE

R. F. Meyer & Associates, LLC — *Senior Associate Attorney*

JULY 2025 – Present

- Serving clients in estate administration, estate planning, guardianships, probate, and various Elder Law matters, and Medicaid applications and asset protection.

Stevens Estate & Elder Law LLC — *Owner*

AUGUST 2024 – JUNE 2025

- Solo firm operating to represent clients in Medicaid applications, asset protection, estate planning, estate administration, guardianship, Social Security disability, and VA benefits matters.

Parks Legal LLC — *Of Counsel*

NOVEMBER 2024 – Present

- Represent clients primarily in estate administration and guardianship matters, with secondary work in Medicaid applications and estate planning

Carlile Patchen & Murphy LLP — *Of Counsel*

APRIL 2021 – AUGUST 2024

- Prepared and delivered asset protection, probate avoidance, and tax savings plans
- Represented parties before probate courts in the following matters:
 - Estate administration (fiduciaries and beneficiaries), including straightforward & contested matters and advising on how to structure administration for creditor protection
 - Adult and minor guardianships (applicants, proposed wards, and related parties)
 - Trust administration (trustees and beneficiaries), including standard administration and declaratory judgment matters
 - Minor & wrongful death settlements
 - Name change

- Developed eligibility strategies and represented applicants for Medicaid (long-term care, MAGI, & Board of Developmental Disabilities waiver), Social Security disability (SSDI & SSI), and Department of Veterans Affairs (aid & attendance)
- Served as guardian, representative payee, trustee, and executor as necessary for incapacitated or deceased individuals
- Prepared and filed individual and trust tax returns (federal, Ohio, local)
- Developed new special needs and Medicaid planning tools and techniques for the firm

AlerStallings LLC — *Associate Attorney*

NOVEMBER 2020 -- MARCH 2021

- Met with a variety of clients to develop estate plans, focusing on probate avoidance, asset protection, and Medicaid planning
- Conducted regular reviews to ensure existing plans are working smoothly
- Answered client questions and concerns on a variety of subjects
- Developed Medicaid and VA Aid & Attendance eligibility plans

Isaac Wiles Burkholder & Teetor LLC, Columbus — *Associate Attorney*

OCTOBER 2018 – NOVEMBER 2020

- Develop estate plans for clients with a variety of needs and background, including:
 - Asset protection
 - Probate avoidance
 - Medicaid planning
 - Special needs planning
 - Tax savings
- Represent executors and beneficiaries in estate and trust administration proceedings
- Represent prospective guardians and wards in applications for guardianship
- Represent insurance company clients in minor settlement and wrongful death cases before probate court
- Develop new tools for firm, including:
 - IRA stretch trusts
 - Post-SECURE Act trust modification
 - Revised powers of attorney
 - Trust decanting strategies & documentation

Cooper Adel & Associates LPA, Centerburg — *Senior Associate Attorney*

OCTOBER 2011 – OCTOBER 2018

- Meet with clients to develop, review, and update estate plans
- Draft and implement trusts, including revocable and irrevocable trusts, third party trusts, special needs trusts, and pet trusts
- Develop and deliver legal authorities (powers of attorney, wills, healthcare directives)
- Prepare applications for Veterans Administration Aid & Attendance benefits
- Prepare and guide applications for long-term care Medicaid across multiple counties
- Represent Medicaid applicants in oral and written administrative appeals

EDUCATION

Capital University Law School — *Juris Doctor*

AUGUST 2008 – MAY 2011, COLUMBUS, OHIO

Member of Moot Court and Law Review.

Indiana University of Pennsylvania — *Bachelor of Arts*

AUGUST 2002 – MAY 2007, INDIANA, PENNSYLVANIA

BA: History

Minors in Asian Studies and German

ARTICLES & PRESENTATIONS

- *The Ohio Probate Process: In 7 Simple Steps* – National Business Institute, December 2023
- *Introduction to Elder Law* – Everhart Advisors University, July 2022
- *Right-Sizing Your Estate Plan* – Meeder Financial seminar, November 2021
- *Estate Planning After SECURE & CARES* -- Columbus Bar Association, September 2020
- *Planning for Long-Term Care & Disability* -- The Complete Trust Course CLE, July 2020
- *IRAs and Trusts: Sophisticated Beneficiary Choices* -- The Complete Trust Course CLE, November 2019
- *Beyond the Basics of Special Needs Planning Part 2: Recent Updates* -- Estate Planning, July/August 2019
- *Continued Attacks on Special Needs Trusts* -- Ohio Estate Planning, Trust, and Probate Journal, May/June 2019
- *Case Study: Diminished Capacity* -- Columbus Bar Association Probate Institute, 2019 (panelist)
- *Beyond the Basics of Special Needs Planning* -- Estate Planning, May/June 2019
- *Special Needs Planning: A Lawyer's Prospective* -- Voya Cares seminar, March 2019