

Legal issues are often difficult to face, but they are necessary to everyone's eventual well being. Planning will assure the future goes as we would wish — and that beats leaving it up to chance.

LEGAL PLANNING

1) Set long- and short-term estate planning goals with the help of an expert certified in estate planning.

Short-term goals

Long-term goals

NOTES:

2) Locate elder care resources. There are both public and private resources available.

Public

Private

NOTES:

CHOOSING AN ATTORNEY

3) Before you settle on an attorney, investigate their reputation in the community/city. _____

4) Check their background and experience: Members of the local bar association? _____

Elder law experience? _____

NOTES:

LEGAL TO-DOS

5) There are important documents you will want to have prepared. These include:

Will (the instrument which disposes of your estate following your death)

Date completed _____ Attorney _____

Trust (usually a living trust, will allow your heirs to avoid probate)

Date completed _____ Attorney _____

Living will declaration (instructions about artificially prolonging your life, in the event of a terminal condition)

Date completed _____ Attorney _____

Durable power of attorney (designates someone to handle your financial affairs,if necessary)

Date completed _____ Attorney _____

Durable power of attorney for healthcare (designates someone to handle healthcare decisions,if necessary)

Date completed _____ Attorney _____

6) Review these documents with the key people in your life (see emergency checklist in Chapter One): _____

Distribute copies to key people. _____

7) Plan to review and update the above documents on an annual basis.

8) Keep copies of the documents:

One set at your attorney's office _____

One set in an accessible place close to home _____

NOTES:

