



ELDER LAW CHECKLIST OF ESSENTIAL LEGAL DOCUMENTS

1. HEALTH CARE POWER OF ATTORNEY (DESIGNATED HEALTH CARE SURROGATE)

Who do YOU want to make your health care decisions if you were unable to do so?

Legal document appointing another person as your 'Health Care Agent' to make your medical decisions when you are unable to do so.

2. LIVING WILL (ADVANCE HEALTH CARE DIRECTIVE)

What are YOUR wishes if you were terminally ill or on life support?

Legal document that makes known your health care wishes regarding life-sustaining care such as food, hydration or ventilators.

3. FINANCIAL POWER OF ATTORNEY (DURABLE GENERAL POWER OF ATTORNEY)

Who do YOU want to pay your bills if you were unable to?

Legal document appointing another person as your 'Agent' to handle your business and financial affairs while you are still alive but unable to do so because you are incapacitated or are unavailable.

4. LAST WILL & TESTAMENT

Who do YOU want to inherit your assets?

Legal document specifying who receives your assets and who will serve as your personal representative for administering your estate AFTER your death.

5. LIVING TRUST

A Living Trust is a popular and flexible Estate Planning tool

Legal arrangement in which you give financial control of property to a Trustee for the benefit of your beneficiaries.

Benefits of a Living Trust include:

- Avoids Court proceedings, such as Probate, contested Wills, and Guardianships
- Provides for the care of an individual with Special Needs
- Provides for the care of a minor
- Insures that your assets will be properly managed and maintained while you are alive in the event of your incapacity, as well as after your death
- Provides for the care of loved ones who have mental or physical impairments, who struggle with addictions, or lack of financial responsibility
- Manages complex family situations, such as blended families and unmarried couples
- Motivates heirs to make smart life decisions and reward them for doing so
- Reduces Estate Taxes for married couples
- Provides for the care of family pets after your death
- Creates flexible Estate Plans to carry out YOUR personal wishes