



Senior Family Solutions
Simplifying Relocation

ELDER LAW PREPAREDNESS PACK

Set up your elder law consultation for success! Use this pack to gather important information, prepare questions for the attorney, and help your meeting go more smoothly. We encourage you to reach out to the attorney to ask about any additional items to prepare.

PREPARATION CHECKLIST

*List may vary depending on personal circumstances.

Personal Information:

- Contact Information
(name/phone number/address, etc.)
- List of Medications and Healthcare History
- Work History

Financial Information:

- Bank Statements
- Investment Account Statements
- Retirement Account Statements
- Income Sources (pension, Social Security, etc.)
- Medicare or Medicaid Documentation

Estate Planning Information:

- Existing Wills and Trusts
- Powers of Attorney
- Health Care Directives
- Real Estate Documents and Property Deeds

Insurance Policies:

- Long-Term Care Insurance
- Life Insurance
- Beneficiaries

Legal Documents:

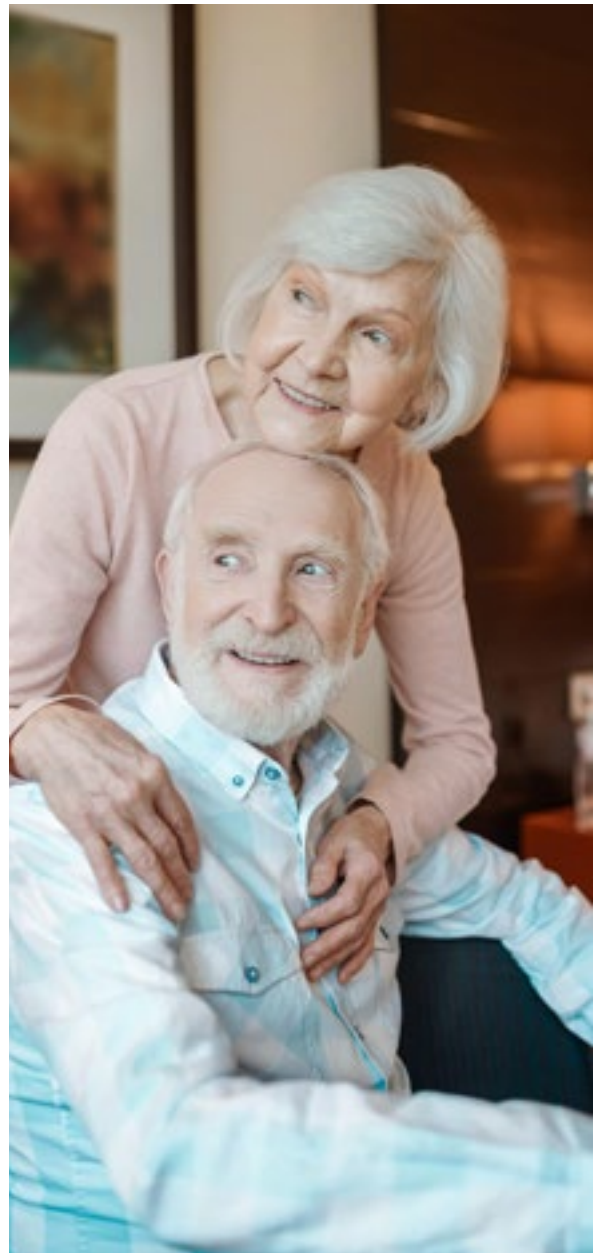
- Legal Judgments and Court Orders
- Ongoing Legal Matters

Long-Term Care Planning:

- Information On Nursing Home or Assisted Living Arrangements

Funeral and Burial Plans:

- Information on Any Pre-Arranged Funeral or Burial Plans



QUESTIONS TO ASK

1. What is your experience with elder law?
2. What are your fees and how are they structured?
3. What are you able to help with?
4. What is the best way to protect the assets in question and what are the tax implications?
5. What are the executor's or administrator's responsibilities in settling an estate, and how can you assist?
6. If there is a family member with special needs, how can we provide for their future without jeopardizing their eligibility for public benefits?

7. What can be done to simplify or avoid the probate process for heirs?

8. What options are available to help pay for long term care? ?

9. Are there any eligible benefit programs you'd recommend?

10. How often should we review and update our plans with you?

QUESTIONS TO ASK

Q: _____

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