



My Legal Plans

Develop a
Financial
Dashboard

Protect
Assets

Prepare
Family
Meeting

Address
Uncovered
Long Term
Care Costs

Minimize
Burden on
Others

Hold
Fair
Meeting

Minimize
Financial
Burden

Legal: Protect Assets (Trust Protections)

I am interested in utilizing a Trust to protect my assets from the following threats:

(Select all that apply)

- ☐ Uncovered Long-Term Care Costs
- ☐ Subsequent Marriages
- ☐ Estate Taxes
- ☐ Inheritance risks

I would like to meet with an Elder Law Attorney to learn which trusts are best for me:

- ☐ Yes
- ☐ Not yet
- ☐ Undecided

Notes regarding my plan to protect my assets:

I plan to consult with my Attorney to align the following beneficiary designations:

(Select all that apply)

- ☐ Bank Accounts
- ☐ Brokerage Accounts (Stocks, bonds, mutual funds, etc.)
- ☐ Retirement Accounts (IRA, 401(k), etc.)
- ☐ Life Insurance (Annuities, etc.)
- ☐ Real Estate (Houses, property, time shares, etc.)
- ☐ Business Ownership (Sole Proprietorship, LLC, Partnerships, etc.)
- ☐ Other

Legal: Minimize burdens

I plan to minimize burdens on others by acquiring the following: (Select all that apply)

- ☐ Healthcare Power of Attorney
- ☐ Financial Power of Attorney
- ☐ Mental Health Advance Directive
- ☐ Living Will (Advance Directives)
- ☐ Handling of Remains

I would like to meet with an Elder Law/Estate Planning Attorney to help me create my estate planning documents:

- ☐ Yes
- ☐ No
- ☐ Undecided

Notes regarding my plan to minimize burdens:

Legal: Choose Fiduciaries

When selecting fiduciaries: (Select all that apply)

- ☐ I plan to select family/loved ones as my fiduciaries
- ☐ I plan to select Professional fiduciaries
- ☐ I plan to name Co-Fiduciaries

Notes regarding my Fiduciary Plans:

[illegible]

Legal: Manuals of Instruction

I plan to include the following provisions for my Fiduciaries: (Select all that apply)

- ☐ Care Management
- ☐ Prohibitions
- ☐ Bar against Guardianship
- ☐ Professional Resources
- ☐ Compensation

Notes regarding my plan to create Manuals of Instruction:

[illegible]

[illegible]