

# ESTATE PLANNING ESSENTIALS

WITH SPECIAL GUEST MICHELE TRIPLETT

## PLANNING FOR THE COMPLETE PICTURE

### 1 CARE OPTIONS

Where do I want to receive care?

- Home Care
- Assisted Living
- Family Caregivers
- Memory Care
- Independent Living
- Skilled Nursing Facility

### 2 FINANCES

How am I going to pay for this?

- Savings/Retirement
- Medicare
- Family Members
- VA Benefits
- Long-Term Care Insurance
- Medicaid Benefits

### 3 INCAPACITY

Who will help me make decisions when I am unable?

- Guardian
- Health Care Agent
- Spouse
- Adult Child
- Parent
- Delegation of Parental Authority
- Relative
- Associate
- Health Care Providers

### 4 ESTATE PLANNING

Are my final wishes clear?

Three Critical Documents:

- ✓ Durable Power of Attorney for Health Care
- ✓ Living Will
- ✓ POST (Physician's Order for Scope of Treatment)

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## What Legal Documents are Essential to my Estate Plan?

### Issue #1 Who can make decisions for you while you're incapacitated?

- Financial Power of Attorney
- Health Care Power of Attorney
- Living Will

### Issue #2 How will my property be divided when I die? Who will be in charge? What work will they need to do?

- Last Will & Testament vs. Living (Revocable) Trust



## WHAT SHOULD I DO NEXT?

- Have a family meeting
- Review old documents
- Outline your wishes
- Meet with experts
- Learn more about community resources



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