

Estate Plan Checklist

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Have I put my affairs in order? Will my wishes and instructions be followed if I am incapacitated? Do my legal documents protect me? Have I provided protection for my loved ones after I pass away? Should I take action today?

Designation of Patient Advocate (Living Will or Advance Directive)

- If I am too sick to do it myself, do I want an advocate who fire doctors who are not helping me, hire specialists and argue with insurance companies who are wrongly denying me benefits?
- Do I want to be kept alive by medical equipment if I am in a permanent coma or vegetative state?
- Do I want tube feeding if I am terminally ill?
- Have I stated my instructions about end of life medical care?
- Have I chosen who will speak for me and be my Patient Advocate?
- Have I completed a Designation of Patient Advocate?

Durable Power of Attorney

- Am I concerned that I may become incapacitated and need to give family members authority now to help me take care of my legal affairs when I am not able?
- Would I rather have the Probate Court appoint a guardian because I have concerns about my family?
- Do I want my spouse or children to be able to sign legal documents for me if I am incapacitated?
- Do I have a Durable Power of Attorney authorizing my spouse or children to help me when I am not able?
- Does my spouse have a Durable Power of Attorney appointing me as his or her Attorney in Fact?

Will

- Have I stated my wishes concerning gifts I wish to make after I die?
- Do I want to make one last charitable gift after I die?
- Do I want to make gifts to friends?
- Do I want to be remembered as a person who helped others after I died?
- Do I want to name the person, my "personal representative," who will take care of my legal affairs after I die?

- Have there been any major changes in my life since I executed my Will?
- Do I have a Will complete with all of my instructions?

Trust

- Do I want to avoid Probate?
- Do I have a family who will take care of me if I become incapacitated?
- Do I want to provide instructions on how to use my assets for my care should I become incapacitated?
- Do I have anybody I can trust with my assets if I am incapacitated?
- Can I rely on children to take care of me if I become incapacitated?
- Do I want to avoid having the Probate Court appoint me a guardian if I become incapacitated?
- Do I want to give guidance and instructions to my loved ones on how to use their gifts after I die?
- Do I want to help my loved ones with guidance and instruction after I die?
- Am I concerned about who will take care of my spouse after I die?
- Do I have a written plan for my care should my spouse die before me?
- Do I want to provide instructions and guidance for the care of my spouse after I die?
- Do I have a disabled son or daughter?
- Do I have a plan for the care of my disabled son or daughter?

Medicaid

- Am I concerned about my spouse if I have to go to a nursing home?
- Do I have enough assets to pay for a long term stay in a nursing home and have enough for my spouse and family?
- Do I want to save money for my family should either my spouse or myself need to enter a nursing home?

Getting my Affairs in Order

- Do I want to make an appointment with my attorney to get my affairs in order?
- Do I want to call Elder Law attorney James Schuster at (248) 356-3500 to make an appointment?