

What you should know and bring when you meet your attorney to make a Will or do estate planning

A. Issues to consider

- Do you think Medicaid may be needed to provide for your long term care if you become ill?
- Whom do you trust to make medical decisions for you when you cannot?
- Do you want to be kept alive if there is no hope for your recovery by any means?
- Whom do you trust to make financial decisions for you, at any time? Pick at least 2 people.
- Whom do you want to be guardian of your children and their property and for how long?
- Whom do you want to designate as the person to carry out your wishes when you are dead?
- Is there anyone you wish to exclude from inheriting from you? If yes, who and why? What about that person's children? Consider how strongly you feel about this and the impact upon your other beneficiaries.

B. (1) Who is/are your family or significant others? Who are you responsible for?

- Children (ages – is guardian needed?)
- Grandchildren
- Parents
- Grandparents
- Spouse/Significant Other- dementia, stroke
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(2) What is your relationship with your Family Members or significant others?

- Financial stability (can they provide for themselves?)
- Emotional stability (do you want to protect/provide for them financially?)
- Drugs? Alcohol? Violence?

C. What are your long term goals for yourself?

- Travel when you retire?
- Your Health concerns.
- Provide for your health and long term health care insurance?
- Stay in home if health fails or require assistance?

D. List of Assets and current value. How are they owned? (individual, joint, or In Trust For)

- stocks and bonds; brokerage accounts (how are they titled/owned?)
- insurance-life (Who owns policy and who is/are beneficiaries (primary/contingent)?)
- insurance – health coverage and any long term catastrophic care or
- savings, CD's
- real estate- specify location, bring copy of deed to verify type of ownership
(joint with rights of survivorship; tenancy by entirety; tenancy in common)
- Co-operative apartment, bring copy of certificate to verify type of ownership.
- IRA's (Who is the beneficiary?)
- Pensions (Who is the beneficiary?)
- 401K's (Who is the beneficiary?)
- Collectables: art; jewelry; cars
- Monthly income and source