

Planning Questionnaire

1. Do you have a Will? (If you answered "NO" proceed to question 4)
2. Does your Will name a Personal Representative as well as an alternate?
3. If you or your spouse dies while one of you is in a nursing home, does your Will protect your assets from passing to your spouse or will those assets be spent paying for nursing home care?
4. If you become ill and incapacitated, does anyone have the written authority for the attorney-in-fact to make gifts on your behalf (this provision is necessary when planning is needed if a spouse or single person is institutionalized). Does your Power of Attorney contain the necessary releases to obtain medical records as a result of the new HIPPA regulations?
5. Do you think that because you are married your spouse can make any and all decisions for you without written permission to do so?
6. If you or your spouse required nursing home care, would your monthly income and long term care insurance be enough to pay the cost of care without having to spend your assets?
7. Are you reluctant to giving assets away to protect those assets from being spent on nursing home care?
8. Do you have an Advanced Health Care Directive and a Living Will?
9. Have you considered a Trust instrument to protect your assets if your spouse became ill allowing another family member to take charge of your financial affairs if you are no longer able to do so?
10. Are you certain that neither you nor your spouse will ever need nursing home long term care?
11. Do you think Elder Law Planning is for people over 65 years of age?