

CHECKLIST FOR ELDER PLANNING

- * Financial Directive
- * Healthcare Directive or Do Not Resuscitate Orders
- * Title to Real Property
- * Pensions or Other Retirement Accounts
- * Financial Accounts
- * Funeral Arrangements
- * Trust
- * Will
- * Social Security
- * Safe Deposit Boxes
- * Disability Benefits
- * Supplemental Security Income
- * Income Taxes
- * Estate Taxes
- * Transportation
- * Home-Healthcare
- * Assisted Living or Long Term Care
- * VA Benefits

- * Probate
- * Credit Cards
- * Elder Financial Abuse or Consumer Fraud Issues
- * Alternate living plan in the event your loved one cannot remain at home

This checklist is not a substitute for legal advice. If you have questions, then please consult an elder law attorney.

© 2011 Kate Willmore, 1407 33rd Street South, Saint Cloud, MN 56301
Telephone:

Please call (320) 217-6030 or e-mail kaw@katewillmorelaw.com

Websites: www.katewillmorelaw.com or www.minnesotae-lawyerkatewillmore.com

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