

Important Legal Documents and Estate Planning

ADDITIONAL TIPS

Start Early.

- To create legally binding arrangements, your loved one needs to be of sound mind. Far more options are available while your loved one still has the legal capacity to make his or her own decisions.

Seek Professional Advice.

- An elder law attorney or legal aid service can help ensure documents are completed correctly and comply with state laws.

Create a document binder.

- Use a physical binder or digital folder to store copies of all key legal and financial paperwork.
- Let trusted family members know where to find this.

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Planning ahead is essential when you are caring for someone. Legal and estate documents help ensure our loved one's wishes are honored, reduce stress during emergencies, and give caregivers the authority they need to help manage care and finances. Consider the following documents.

1

Durable Power of Attorney (Healthcare)

A Healthcare Power of Attorney names someone to make medical decisions on your loved one's behalf if they cannot speak for themselves, ensuring healthcare choices reflect their wishes and values.

2

Durable Power of Attorney (Financial)

A Financial Power of Attorney allows a trusted person to manage money-related matters such as paying bills, handling bank accounts, and managing property if your loved one is no longer able to do so.

3

Living Will

A living will is a specific type of advance directive that outlines your medical treatment preferences, particularly in the event of a terminal illness or injury. It specifies the medical procedures or interventions you do or do not want to receive in the event these choices become necessary.

4

Will or Trust

A will or trust explains how assets should be distributed after death and may name guardians or trustees if needed. Trusts can also help manage assets during life and may reduce complications as an illness progresses, making them especially helpful for long-term planning.