Yvonne Amrine, Amrine Law

- Practicing Estate & Elder Law Attorney
- Founded Amrine Law in 2011
- Member of NAELA (National Academy of Elder Law Attorneys)
- Personal Experience- Mother with Alzheimer’s Disease
  - Trustee and Guardian since 2001

VA Accredited since 2011 http://www.va.gov/ogc/apps/accreditation
What Legal Documents Do You Need to Remain in Control?

• Wills, Trusts, Powers of Attorney
• Most important documents—Power of Attorneys for Healthcare and Finances
  • Healthcare and end-of-life decisions
  • Financial management
    • Paying bills
    • Tax returns
    • Retirement administrator
    • Bank and investment accounts

• If you own real property in California – You need a Trust!
  • Avoids Cost of Probate in time and money – Statutory fees ($$$$$)
  • Can enable advanced planning techniques for LTC planning
Financial Powers of Attorney

- A Standard Statutory form is not enough
- Make sure your estate plan takes into account the possibility of needing to qualify for a government benefit
- Give your trusted agent the tools to take care of you
  - Who do you choose?
    - Oldest child? Most Responsible? More than one?
    - Are they equipped to do the job? Do they have the temperament? How much time does it take? Is their life stable?
  - Who can you trust?
    - Private Professional Fiduciary or Trust Officer at a bank?
Advanced Healthcare Directive

• Makes sure that your healthcare agent understands your wishes.
• Gives doctors and family a clear direction for the type of care you want.
• Gives your agent control and direction over remains.
POLST

- Physicians Order for Life Sustaining Treatment
  - For the seriously ill
  - Tells your exact wishes about certain medical treatments
  - A signed medical order that your health care team can act upon
  - Goes with you to your home, your hospital, or your long-term care facility
    - It goes where you go

It is a good idea that seriously ill people have both an Advance Directive and a POLST form
Thank you

QUESTIONS

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