

Taking Control of Your Future

The Legal and Financial Aspects of Long Term Care

Yvonne Amrine, AMRINE LAW



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



UNITED STATES
DEPARTMENT OF VETERANS AFFAIRS

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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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AMRINE Law
Life is short, plan well.™