

The Good, The Bad, The Necessary

Legal Documents for Planning Peace of Mind

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What Are We Talking About When We Use the Word Planning??

- Planning for events in life:
 - Expected and Unexpected
- Involves understanding the issues
- Educating oneself
- Taking steps: meeting with the right people, preparing the right documents
- Choosing people to be involved in support or decision making



Who Should Be Planning?

Why Are We Planning?

When Should this Planning Happen?



The Bad...

- ▶ No planning
- ▶ Old planning
- ▶ Out of state planning
- ▶ Unsigned planning
- ▶ Planning but with edits
- ▶ Unfinished planning
- ▶ Missing or misplaced planning



The Good...

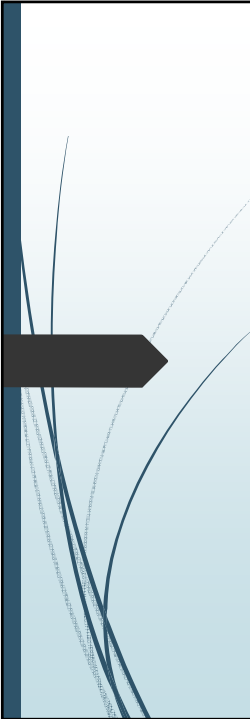
- ▶ Education
- ▶ Understanding
- ▶ Having planning documents
- ▶ Documents that take into account your present and foreseeable future needs



The Necessary...

- ▶ Powers of Attorney
- ▶ Advance Health Care Directive
- ▶ Living Will
- ▶ SDM Agreement
- ▶ Will
- ▶ Trust

Thank you!



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