

# PEACE (of Mind) on EARTH GOODWILL TOWARDS MAN!

BY BEN KINIRY, ESQ.

It is the holidays and a word that comes to mind is "Peace." We all want to have peace in our lives. Peace of mind is something many of our clients experience after working with us to develop an estate plan or to otherwise solve a problem they are experiencing. Please review the writing below and see if there is an issue in your life that needs to be addressed. If you do, you may very well find peace of mind in your life.

When clients call the firm or come in for an appointment, often they don't know what questions to ask. Since they don't practice estate planning or elder law on a daily basis, I really wouldn't expect them to. What issues should you be thinking about? Most clients come to us with a particular goal in mind or an issue that they want to solve. For example, a person might call and say "my financial planner says that I need a trust" or "my mother fell and is now in a nursing home and we don't know what to do."

There are so many issues that estate planning and elder law attorneys can help you with, and perhaps should help you with, that you are likely unaware of or certainly are not thinking about on a daily basis.

In order to help clients figure out what they would like to accomplish beyond the one or two issues that are on the forefronts of their minds, I offer a checklist titled "Peace of Mind Checklist," which you will find below.

The Checklist is intended to be a list of the types of things or questions that people should or could be asking themselves in regards to their loved ones. I would have you review the Checklist



and see what comes to mind. If you find that you have questions on these topics or if you believe there are actions that you should or could be taking, I would have you contact our firm to discuss them further.

If I could make a self-serving suggestion, I would have you cut the Checklist out of the Bow Times and set it aside in a drawer. Perhaps someday, when you believe it's time to take action, the Checklist may be helpful in facilitating a conversation with the attorney who is helping you develop your plan.

## PEACE OF MIND CHECKLIST

Please check the following questions that are important to you:

- We are concerned about losing our assets to the high costs of long-term care. How can we practice financial self-defense?
- My child is disabled/a spendthrift/is in a bad marriage/abuses alcohol. How can I protect his or her future?
- How can I arrange my estate so my children's inheritance will be protected from their creditors, such as if they get divorced or are sued?



My parents are aging. What actions should they take to help them to remain independent and protect their assets?

Do I have to be wealthy to benefit from a living trust? What are the benefits of a Trust?

If I can't make legal and financial decisions for myself, how can I be sure my affairs will be handled in my best interest?

If I am too ill to make health care decisions for myself, how can I be sure my wishes will be carried out?

How can I be sure my money and property end up in the right hands when I'm gone? What if I want to control how my money will be utilized when I'm gone?

My parent just passed away. What do I do now?

I want to be sure that my hard earned money in my IRA will benefit my children the most

How can I assure a long term income stream for them? I'm concerned they will not inherit my IRA and will lose out on the tax free growth.

How can I ensure my children won't have to go to the probate court when I die?

My parents are moving in with us, is there any planning that should be done now?

We have a treasured water front property in the family, how can we protect this property? What is the best way to arrange our estate so that our children and grandchildren can enjoy the property for many years, while keeping the peace among them?

My parent died and my sibling is handling the estate, but is not sharing any information with me. What are my legal rights? Many of our clients came to us with these same questions and many more.

Contact us for estate and elder law planning solutions that will help you sleep well at night.

*The information provided in this article (and the checklist) does not constitute legal advice.*

*Happy  
Holidays*



**Wishing you a Merry Christmas  
And Safe & Prosperous 2020!**



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