

PEACE OF MIND CHECKLIST

BY BEN KINIRY, ESQ.

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 here.

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.



KINIRY JOINS LABOE & TASKER LAW FIRM

Attorney Ben Kiniry has joined the law firm of Laboe & Tasker, PLLC at 6 Loudon Road in Concord. Longtime Bow resident John Laboe said "I am pleased to have Ben's skills added to our trust and estate planning practice." 603-224-8700.

Peace of Mind Checklist

Please check the following questions that are important to you:

- I am concerned about losing my assets to the high costs of long-term care for myself and my spouse. Will we lose everything to pay for care, or are there options?
- My child is disabled. How can I protect his or her future?
- How can I set things up so my kids' inheritance will be protected if they get divorced or are sued?
- My parents are aging. What should I know to help them to remain independent and protect their assets?
- How can I minimize or eliminate paying taxes upon my death?
- Do I have to be wealthy to benefit from a living trust? What are its benefits?
- If I can't make legal and financial decisions for myself, how can I be sure my affairs are conducted 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?
- My parent just passed away. What do I do now?
- How can I assure a long term income stream from my retirement accounts to my children when I'm gone?
- How can I ensure my children won't have to go to the probate court when I die?

Many of our clients come to us with the same questions. Contact us for estate and elder law planning solutions that meet your needs.

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



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