Is Your Estate Plan **Elder-Law Ready?**

A quick self-check for seniors, caregivers, and adult children to spot planning gaps and prepare for next steps. Check the boxes that apply to you, and consider speaking with an advisor or elder law attorney if you notice any missing pieces.

Legal Essentials

- [ ] Durable Power of Attorney is signed and accepted
- [ ] Healthcare Proxy (Medical POA) is in place
- [ ] Will reflects my current wishes
- [ ] Trust is created and funded (if needed)
- [ ] Beneficiaries are up to date

Long-Term Care & Medicaid Planning

- [ ] I've reviewed how long-term care could impact my assets
- [ ] I've explored Medicaid, VA benefits, or LTC insurance
- [ ] Care preferences are documented
- [ ] Special needs planning is in place (if applicable)

Decision-Makers & Transitions

- [ ] My agents are named and still willing to serve
- [ ] Trusted people know where to find documents
- [ ] My plan was reviewed within the last 2–3 years

Common Pitfalls

- [ ] All documents are signed and valid
- [ ] Instructions across will, trust, and forms align
- [ ] No outdated documents
- [ ] Plan reflects current life and relationships