

ARE YOU PREPARED FOR THE FUTURE?

Do you have a Power of Attorney that:

Yes___ No___ goes into effect immediately

Yes___ No___ is durable [stays in effect even when you are incompetent]

Yes___ No___ has only one person named as your Attorney-in-fact [the person with the “power”]

Yes___ No___ has an alternate named

Yes___ No___ has been recorded in the deed room in the county where you live and where you own real estate

Yes___ No___ is less than 10 years old [old Powers of Attorney are hard to use]

Do you have a Will that:

Yes___ No___ is up to date

Yes___ No___ has two witnesses who saw you sign it and saw each other sign it

Yes___ No___ is notarized

Yes___ No___ is in a fireproof place

Yes___ No___ is in a place where your family will be able to find it

Yes___ No___ does not have handwritten additions or deletions

Do you have a Living Will that:

Yes___ No___ that looks like the Kentucky statute [has lines on the left side where you initial your end of life choices]

Do you have a Health Care Surrogate that:

Yes___ No___ names only one person as your Health Care Surrogate

Yes___ No___ names an alternate Health Care Surrogate

Yes___ No___ specifically includes HIPAA language

Yes___ No___ you’ve given a copy of the document to your Health Care Surrogate

Do you have a specific plan to handle finances should you need Nursing Home care that:

Yes___ No___ is prepared by an elder law attorney

Yes___ No___ that will help preserve assets should you or a spouse need Nursing Home care in the future

Have you created potential problems for your family, should Medicaid ever be needed to help pay Nursing Home costs by:

Yes___ No___ transferring assets to your family

Yes___ No___ adding family members names’ to your assets

Yes___ No___ establishing a Revocable Living Trust or an Irrevocable Trust

Yes___ No___ purchasing an annuity