



LEGAL MATTERS ACTION CHECKLIST

Chapter 7 of *The Complete Eldercare Planner*

ESTATE PLANNING	To Do By	Completed
<i>Set estate planning goals</i> _____		<input type="checkbox"/>
<i>Locate elder law resources</i> _____		<input type="checkbox"/>
<i>Draw up</i>		
will _____		<input type="checkbox"/>
trust _____		<input type="checkbox"/>
letter of instruction _____		<input type="checkbox"/>
power of attorney for property _____		<input type="checkbox"/>
power of attorney for health care _____		<input type="checkbox"/>
<i>Duplicate, distribute, and review documents with</i>		
<i>key family members</i> _____		<input type="checkbox"/>
<i>Review assets</i> _____		<input type="checkbox"/>
<i>Make plans to review and update legal documents</i> _____		<input type="checkbox"/>
<i>Store document in a safe, 24-hour-accessible location</i> _____		<input type="checkbox"/>
<i>Obtain important legal telephone numbers</i> _____		<input type="checkbox"/>

Distribute legal phone numbers to key people _____

JUSTICE FOR ALL

Research advocacy groups _____

Know how to reach

city hall _____

village of _____

mayor's office _____

city council members _____

senator _____

congressman _____

governor's office _____

Vote in local and national elections _____

Stay informed

community newspapers _____

city newspapers _____

political flyers _____

Internet _____

Recognize Medicare fraud and abuse _____