Legal & Financial Prep Checklist

What to put in place, what to gather, and what to ask, before and during an elder law visit.

Getting these documents in order early protects everyone and prevents crises later. This is a checklist to prepare with a qualified North Carolina elder law attorney. It is not legal advice, and these are not our forms.

Key documents to have in place

- ❑ Health Care Power of Attorney (names who makes medical decisions if you cannot)
- ❑ Advance Directive for a Natural Death / Living Will (your end-of-life wishes)
- ❑ Durable (Financial) Power of Attorney (names who manages money and property)
- ❑ Will and, if appropriate, a trust
- ❑ HIPAA release so doctors can share information with your agents
- ❑ MOST form (Medical Orders for Scope of Treatment), completed with a physician

Documents to gather before an attorney visit

- ❑ Photo ID, Social Security and Medicare/Medicaid cards
- ❑ List of assets: accounts, property, vehicles, life insurance, retirement
- ❑ Recent bank and investment statements, and any deeds or titles
- ❑ Income sources (Social Security, pension, VA) and monthly expenses
- ❑ Existing legal documents (any prior POA, will, trust, or directive)
- ❑ Insurance policies, including long-term care insurance if any

Questions for an elder law attorney

- ❑ Which documents do we need, and are our existing ones current under NC law?
- ❑ How do we plan for the cost of long-term care, and could Medicaid be part of it?
- ❑ How do we protect a spouse who remains at home?
- ❑ What are your fees, and is this a flat fee or hourly?

Official North Carolina forms (free)

• Health Care Power of Attorney and Advance Directive (NC Secretary of State): **sosnc.gov/divisions/advance_healthcare_directives**
• Statutory Financial Power of Attorney (NC General Statutes, Chapter 32C): **ncleg.gov — Chapter 32C, Article 3**
• Find a local attorney: ashevilleseniorcareguide.com/guides/elder-law-attorneys