The Benefits of a Life Care Plan

As we age, planning for long-term care becomes increasingly important. Gone are the days when legal planning involved simply a will and a power of attorney. While it is important to plan for what happens to your assets after you pass away, through estate planning, it is also important to plan for your personal and financial management while you are still alive, through Life Care Planning.

Our Life Care Planning services include a comprehensive diagnostic assessment to determine what needs to be done to help you receive the care you need and the correct legal tools to achieve that in a particular situation. The goals of our planning process are (a) getting the best care for you, based on the medical conditions that are present and the types of care your financial resources will support, and (b) achieving peace of mind for you and your family.

- We analyze whether you might be eligible for programs such as Medicaid or Veterans Aid and Attendance, and whether asset restructuring is necessary.
- If any estate planning documents are needed, we draft them with your long-term care needs and resources in mind.
- The plan includes advocacy for you, to enhance receiving the care you need.

Life Care Planning is a unique approach based on a relationship between you and our team, as you progress through the transitions related to needed care. The Life Care Planning process often includes the following:

**Assessment.** We analyze your living situation to assess its continuing viability for you. We make suggestions for possible changes to promote your good health and safety. We help you and your family in locating the appropriate type of care, coordinating private and public resources to pay for the care, and work to preserve your right to quality care. The Assessment is performed by our Elder Care Coordinator, Tracy Swanson, RN (right), in conjunction with the attorney and appropriate community resources.

**Asset Protection.** Long-term care, regardless of its location, can be financially devastating. We focus on determining whether, when long-term care is needed, there are ways to protect some or all of your savings. Our experience in elder law may help you preserve a significant portion of your precious assets.

**Planning for Incapacity.** Our plan includes the tools necessary to ensure that, if you no longer can or wish to make your own financial or healthcare decisions, the transition to a fiduciary of your choosing will be as smooth as possible.

**Estate Planning.** Proper planning will allow you to distribute assets upon your death in a way that minimizes the administrative cost and burden on your beneficiaries.

There are many ways to accomplish these goals, and it is our job to advise you as to which are the best and most economical for you, based on your current and future needs for care.

**Elder Care Coordination**

As you enter this phase of your life, it is important for you and your family to have a supportive and knowledgeable advocate to accompany you on your journey.

The purpose of Elder Care Coordination is to help you attain the highest quality of life, within your circumstances, and to lighten the decision-making burden on you and your family. In order to achieve this goal, the Elder Care Coordinator:

- identifies care problems that you and your family may be facing, and assists in solving them;
- interfaces with medical and other healthcare providers on your behalf by communicating, interacting, and collaborating through this sometimes confusing medical maze;
- reviews medical issues and offers referrals to appropriate resources to provide the right care while conserving financial resources;
- provides support, guidance and advocacy during a crisis;
- provides education about care issues to you and your family; and
- offers ongoing counseling and support.

Our Elder Care Coordinator, Tracy Swanson, RN, is your point of contact, and she assists in coordinating the services involved in your care. Tracy has extensive knowledge of the resources in our community, including their quality, availability and relative cost. When family and loved ones are not immediately available, Tracy provides an extra pair of eyes and ears that can be invaluable.