



**MARGOLIS  
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*Planning for Life*

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## Peace of Mind Checklist

Please check the following questions that are important to you:

- ☐ I am concerned about losing my assets to the high costs of long-term care for myself and my spouse. Will we lose everything to pay for care, or are there options?
- ☐ My child is disabled. How can I protect her future?
- ☐ How can I set things up so my kids' inheritance will be protected if they get divorced or are sued?
- ☐ My parents are aging. What should I know to help them to remain independent and protect their assets?
- ☐ How can I minimize or eliminate paying taxes upon my death?
- ☐ Do I have to be wealthy to benefit from a living trust? What are its benefits?
- ☐ If I can't make legal and financial decisions for myself, how can I be sure my affairs are conducted in my best interest?
- ☐ If I am too ill to make health care decisions for myself, how can I be sure my wishes will be carried out?
- ☐ How can I be sure my money and property end up in the right hands when I'm gone?
- ☐ My parent just passed away. What do I do now?

Many of our clients came to us with the same questions. Contact us for estate and elder law planning solutions that meet your needs.

