

Long-Term Care Planning

Elder Law Attorney Documents

Documents to consider bringing with you to an elder law attorney appointment:

- Itemized list of assets (e.g., bank accounts, contents of safe deposit boxes, vehicles, real estate, etc.), including current value and the names listed as owners, account holders and beneficiaries
- Copies of all estate planning documents, including wills, trusts and powers of attorney
- Copies of all deeds to real estate
- Copies of recent income tax returns
- Life insurance policies and cash values of policies
- Health insurance policies or benefits booklets
- Admission agreements to any health care facilities
- List of names, addresses and telephone numbers of those involved, including family members, domestic partners and caregivers, as well as financial planners and/or accountants

Abstracted from [Alzheimer's Association](#) website