



5 IMPORTANT LEGAL DOCUMENTS FOR CAREGIVERS

Getting The Legal Stuff Done Now

Benefits Everyone

One day, your older adult won't be able to manage their own legal matters and will rely on you to act in their best interests.

Planning ahead and getting the legal stuff squared away before a crisis allows your older adult and your family to stay in control of critical decisions. The downside to not having proper legal paperwork in place is being forced to allow lawyers and courts to get involved in family matters.

Legal Basics For Caregivers

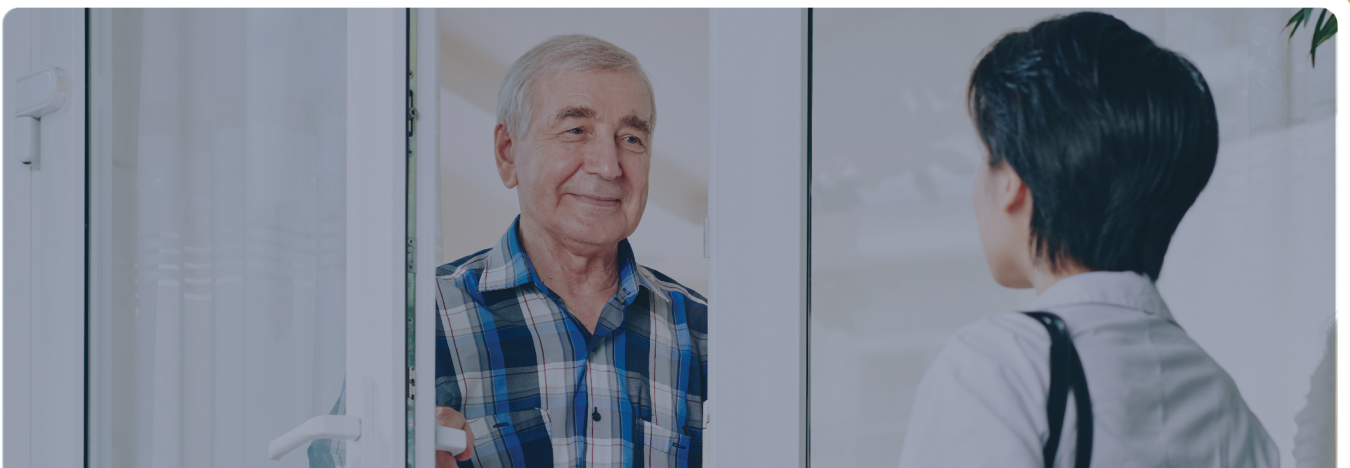
There's a lot for caregivers to manage, so we've narrowed the list to the 5 most important legal documents. This list doesn't cover every situation and shouldn't be considered legal advice, but it will help you cover the basics.

01 Power of Attorney (POA)

- This allows your older adult to **authorize someone to make legal decisions** when they are no longer competent.
- POA also covers authority to make financial decisions.

02 Durable power of attorney for health care (also known as a health care proxy)

- This allows your older adult to authorize someone to make all decisions regarding health care, including choosing health care providers, medical treatment, and end-of-life decisions.
- This power only goes into effect when your older adult is unable to make decisions for themselves.



03 Living will or Advance Directive

- This allows your older adult to state, in advance, **what kind of medical care they do and do not want to receive.**
- This also covers what life-support procedures they would not like to have.
- This is used when a person isn't able to make their wishes known on their own.

04 Living Trust

- This allows your older adult (the grantor) to create a trust and appoint someone (a trustee) to manage the trust assets when they aren't able to manage their finances.
- A person or a financial institution can be the trustee.

05 Will

- Your older adult's will names an executor and beneficiaries.
- The executor is the person who will manage your older adult's estate at the time of death.
- Beneficiaries will receive the estate at the time of death.



What happens if you don't plan ahead

If no planning is done before your older adult becomes incapacitated, family members must ask a court to appoint a conservator or guardian.

A conservatorship can be difficult for families because almost every action or decision on behalf of your older adult must be court supervised and approved.

How to get started with Legal Documents

For legal matters, hiring an elder law attorney is always recommended. It's also smart to do your own research so you understand what's happening.

In addition, you can usually seek advice on legal issues from social workers or clergy, free of charge.

