Brody & Brody LLP
Elder Law and Special Needs
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CHECKLIST – IMPORTANT PAPERS

What to Bring to Your Elder Law Advisor		
Directives	☐	Power of attorney
	☐	Health care proxy
	☐	Living will / health care directive
	☐	Last will and testament
	☐	Trust
Assets	☐	Life Insurance
	☐	Other death benefits
	☐	Long term care insurance
	☐	Bank account(s) or money market(s)
	☐	IRAs
	☐	Stocks, Bonds
	☐	Retirement Fund
	☐	Prepaid funeral arrangements
Income sources	☐	Employer
	☐	Social Security
	☐	Disability
	☐	Pension
	☐	Interest / dividends
	☐	Brokerage statements
	☐	Rental property
	☐	Marital support
Financial beneficiaries	☐	Family
	☐	Friends
	☐	Charities
Special possessions	☐	List major items and recipients

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