THE CLIENT CHECK-UP FORM

Free for Professionals & Families

Prepared by

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CLIENT CHECK-UP FORM

For Clients / CPA's / Investment Representatives to Assess Preparedness

The Elder Law Office of David Wingate, LLC prepared this "client check-up" to test whether your long-term care plan meets essential standards. This check list covers the essential items which should be included in all senior's plans. This check list may alert you to certain defects in your current plan; or defects that could cost your client and their loved ones dearly in the future.

	Yes	No	*Unknown*
1. Does your Attorney Practice in Elder Care Law?			
1.1 Does the attorney practice *exclusively* in Elder Care Law?			
1.2 Does the elder care attorney regularly attend educational conferences?			
2. Elder Care Planning			
2.1 Does the Client have a plan to ensure their quality of life?			
2.2 Has the Client received an analysis of their long-term care needs?			
2.3 Did the attorney prepare a plan that anticipates many situations involving income, assets, investments, long-term care strategies and funding?			
2.4 Does the Client utilize all available legal, financial, insurance and other planning tools to ensure their quality of life?			
2.5 Does the Client have an Elder Care Plan?			
3. Asset Protection In Case of Nursing Home Admission			
3.1 Has the Client purchased Long Term Care (LTC) Insurance?			
3.2 Does Client's Financial Power of Attorney have Medicaid planning powers?			
3.3 Does Client have an Asset Protection Plan?			
3.4 Has Client transferred any investments to an Irrevocable Trust?			
4. Probate Avoidance Strategies			
4.1 Has Client set up a Revocable Living Trust?			
4.2 If yes, is the Trust funded?			
4.3 If no, has Client set up a comprehensive plan using deeds, joint property and beneficiary forms to avoid probate?			

	Yes	No	*Unknown*
5. Does Client have a Will?			
5.1 Has Client provided detailed instructions to dispose of their assets?			
5.2 Has Client reviewed these wishes within the past 2 years?			
6. Is your Client's Financial Power of Attorney (FPOA) up-to-date?			
6.1 Did Client update FPOA within past 2 years?			
6.2 Is FPOA immediately effective?			
6.3 Is FPOA "durable" (endure after incapacity)?			
6.4 Does FPOA contain a gifting provision?			
6.5 Does Client have a FPOA?			
7. Does your Client have a Health Care Agent (HCA)?			
7.1 Does the HCA have a HIPAA release?			
7.2 Does HCA contain a back-up health care agent?			
7.3 Has Client updated HCA within the past 2 years?			
7.4 Does Client have a HCA?			
8. How Complete is Client's Living Will?			
8.1 Does the Client want artificial life support care?			
8.2 Does the Client request comfort care?			
8.3 Does it cover a vegetative state?			
8.4 Does it cover an end-stage condition?			
8.5 Client does not have a Living Will			
9. Medical Record Privacy Releases (HIPAA Releases)			
Does Client have a HIPAA release for loved ones to obtain medical records?			

	Yes	No	*Unknown*
10. Is Client prepared for a Health Care Crisis			
10.1 Has your Client discussed end-of-life care wishes?			
10.2 Are the advance directives with Client's doctor and local hospital?			
11. Does Client Have Detailed Instructions on What To Do Upon Death			
11.1 Did Client state funeral preferences?			
11.2 Did Client state organ donation wishes?			
12. Availability of Local Investment Representative			
Does Client have an experienced local investment representative with whom Client consults on a regular basis?			
13. Estate Tax Prevention (For Estates Over $2.0 million)			
13.1 Does Client have a Trust that has been updated within the past 2 years?			
13.2 Does Client have a plan to make annual gifts to loved ones?			
13.3 Has Client considered buying life insurance to be owned by a Life Insurance Trust?			
13.4 Did Client consider charitable giving strategies?			
14. Client's Plan to Maintain and Organize Estate Plan			
14.1 Has the Client an organized estate planning binder for the estate?			
14.2 Does Client have a plan to review the estate plan with the attorney?			
14.3 Does Client receive updates from the attorney about changes in the law?			

If you or your Client has answered any of the questions "no", or Client is missing any essential document, Client should meet with an experienced Elder Care Planning Attorney to correct the defect.

Law Firm Disclaimer: The above list is a general list and it cannot replace a specific analysis of a client's plan by an experienced Elder Law Attorney. The form is not providing legal advice but is for information only.

For an appointment or more information, call 301-663-9230 for Frederick office or 240-453-0070 for Rockville office. For additional information, see our website: **www.davidwingate.com**