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Top 10 Ways to Keep Your Legal Affairs Organized

- 1 – Keep a list of the names and numbers of the professionals that you work with as well as your account numbers, securities and insurance information.
- 2 – Keep your list from #1 above and your Estate Planning documents together to help your family avoid the Scavenger Hunt.
- 3 – Use a fireproof box for those documents that the family has access to in the event of an emergency. Alternatively use a safe deposit box that the family can get into in the event of an emergency.
- 4 – Review and update your Estate Planning documents every three to five years.
- 5 – Make sure to have alternate designees on your documents.
- 6 – Make sure that your documents have a HIPAA representative designated on the Power of Attorney.
- 7 – If you have a Revocable Living Trust, make sure that it is funded.
- 8 – Make sure to consult with an Elder Law attorney to create a long term care plan in the event that the unexpected happens.
- 9 – If you have loved ones with special needs, make sure that you have a properly drafted Special Needs Trust.
- 10 – Subscribe to our bi-monthly e-letter *The Insight: News, Stories and Thoughts on Elder, Special Needs and Probate Law* to stay updated in all of the laws as they arise and caregiver information. To subscribe:
 - Email dmayoras@brmmlaw.com;
 - Go to our website at www.thecenterforelderlaw.com and click “subscribe to our e-letter”; or
 - Call us at 248-641-PLAN or 1-877-PLAN-758.

For additional questions please contact Danielle Mayoras at dmayoras@brmmlaw.com or 1-877-PLAN-758.