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### **Top 10 Ways to Keep Your Legal Affairs Organized**

- 1 – Keep a list of the names and numbers of the professions 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 and 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 and Special Needs Law and Probate Litigation* to stay updated in all of the laws as they arise and caregiver information. To subscribe,

- Email [dmayoras@brmmlaw.com](mailto:dmayoras@brmmlaw.com);
- Go to our website at [www.TheCenterForElderLaw.com](http://www.TheCenterForElderLaw.com) and click “subscribe to our e-letter”; or
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