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Geriatric Care Management for the
Metro Atlanta Area -
Assisting medically frail seniors, disabled
adults, & their caregivers.

SeniorCare Options

www.seniorcareopt.com

770-579-9177

What is a Will? And, Yes, You Need One!



It's hard to believe we are at the start of another year! I am certain you all, like us, use this new beginning to update personal goals and resolutions. It's also a great time to take a look at what you have, what is currently helpful, and what you might need – and this is especially true when it comes to proactively looking at your own financial, medical, and legal information.

It is important regarding legal information - that you look at the protection of your assets and property, your healthcare decisions, your funeral and end of life decisions, and the privacy of your health information. Current statistics show that **less than half** of those able to complete these important documents such as healthcare advance directives, financial powers of attorney, and legal wills have done so! This can leave families without true guidance and "peace of mind" – while also increasing financial risk and causing of unnecessary steps and headache because the proper documents were not in place – such as the need for guardianship or expensive probate procedures.

A will, if properly executed, is a valid legal document that directs how certain owned property is to be distributed after your death. This property can include tangible possessions (such as clothing, cars, furniture, real estate, bank accounts with no pay-on-death designation, and stocks/bonds with no transfer-on-death designation, etc.). Every adult should have a properly drafted and executed will (**our recommendation is through an attorney with practice experience in estate planning**) – regardless of one's asset level, marital status, parent or not, health status, etc.

With this document, you can:

- Decides to whom, how, and in what amount the estate is distributed – including to those outside of who would be heirs as determined by state law (such as a charity)
- Nominate a person to be the guardian of minor children
- Distribute property to a trustee to manage on behalf of minor or special needs children or incapacitated adults
- Choose the person or entity to serve as executor of the estate and to ensure that the person chosen for this role has the least complicated probate process
- Structure the estate plan to reduce federal estate taxes

The laws of each state establish the requirements for a valid will – and a will is recommended to be reviewed periodically (no less than every 5 years) to ensure that it continues to accomplish the goals that are desired by the person who created it. This is, also, of incredible importance with major life changes such as changing state of residence, the death of those listed within the will, the birth of children, divorce, etc. As long as you remain competent, you are able to change or revoke your will at any time before your death.

Resources Available

National Academy of Elder Law Attorneys – <http://www.naela.org/>

AARP – Information on Estate Planning -
<http://www.aarp.org/money/estate-planning/>

National Elder Law Foundation - <http://www.nelf.org/>

The American College of Trust and Estate Counsel - <http://www.actec.org/>

State Bar of Georgia - <http://www.qabar.org/>

Support Group Information

Lacy Doremus, LMSW, C-ASWCM, facilitates a monthly caregiver support group at 7pm at Presbyterian Village - conference room between Hearthstone and Wellness center. The address is 2000 E West Connector Austell, GA and meetings are held the last Tuesday of each month at 7pm.

Lisa Meeks, CMC, CTRS, facilitates a monthly spousal caregiver support group on the third Thursday at noon at Arbor Terrace East Cobb – private dining room. The address is 886 Johnson Ferry Rd. Marietta, GA. RSVPs are required and should be provided to Arbor Terrace at 770-977-4420 - as complimentary lunch is served.

Lisa also facilitates a monthly spousal support group at Arbor Terrace of Crabapple on the first Tuesday each month at noon – private dining room. The address is 12200 Crabapple Rd. Alpharetta, GA. RSVPs are required and should be provided to Arbor Terrace at 678-894-7803 - as complimentary lunch is served.

Information about SeniorCare Options

SeniorCare Options is a team of Certified Professional Geriatric Care Managers throughout the Metro-Atlanta area. Our team consists of Master's level clinicians in the fields of counseling, social work, and therapeutic recreation – as well as registered nursing. Our backgrounds are vast and specific to the presenting clinical needs of our clients and their families who are in periods of transition, have chronic or difficult-to-manage conditions, and who require increased guidance. Our interdisciplinary focus, extensive experience, and heightened sensitivity to their specific needs prove to be an incredible asset to families faced with the maze of options and care needs.

For more information regarding Geriatric Care Management services, our support groups, or to inquire about requesting services for someone under your care through SeniorCare Options, please do not hesitate to contact us at: 770-579-9177 or brandih@seniorcareopt.com.