

## WELLNESS KEY 5 TOOLS

# Estate and Advance Care Planning 101

## What is estate and advance care planning?

The process of preparing legal documents that outline how you want your finances, belongings and medical care to be handled if you become unable to make decisions.

## Who should do estate and advance care planning?

Every adult regardless of age or health who wants their personal wishes to be known and followed should have a plan.

## What role do care partners play in estate and advance care planning?

Care partners have their own estate and advance care planning needs and can support a loved one by assisting with discussions, meetings with attorneys and communicating wishes if needed.

## Why do people often put off estate and advance care planning?

Many feel overwhelmed, uncomfortable or afraid thinking about future needs, which can make it hard to start planning. You don't need to make all the decisions at once — take one step at a time.

## How do I get started?

Learn what each document does. Start early and involve those who will help carry out the plans. Consult an elder law or estate planning attorney for legal guidance. For referrals, contact:

- The National Academy of Elder Law Attorneys at 1-703-942-5711 or [Naela.org](http://Naela.org)
- Your local Area Agency on Aging at 1-800-677-1116 or [Eldercare.acl.gov](http://Eldercare.acl.gov)

Documents	What It Does	Who to Pick
<b>Power of Attorney for Healthcare</b>	Enables someone to make medical decisions for you if you can't	A trusted person who knows your health wishes (agent)
<b>Power of Attorney for Property</b>	Permits someone to handle your finances and property if you are unable	A responsible, budget-conscious person to manage finances and belongings (agent)
<b>Will</b>	Explains how you want belongings divided after you pass away	An organized person who can smoothly carry out your wishes (executor)
<b>Trust</b>	Manages your assets during your life and after; helps simplify legal matters	A reliable person who will carefully follow your instructions (trustee)

## Future Care Preferences

Advance planning in healthcare means making choices about your medical care in advance. This includes documents like the Physician Orders for Life-Sustaining Treatment (POLST) form, which outlines wishes for end-of-life care.

Learn more about estate and advance care planning at [Parkinson.org/Financial](http://Parkinson.org/Financial).



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