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# What to Bring to Your Elder Law Appointment

Posted on March 13, 2024



When meeting with an [elder law](#) attorney, it is important to come prepared with relevant information and documentation to make the most of your time.

**Here is a general checklist of items you should bring to an appointment with an [elder law attorney](#):**

## 1. Contact Information:

- For key family members and beneficiaries

## 2. Financial Information:

- Bank statements
- Investment account statements
- Retirement account statements
- Income sources (pension, Social Security, etc.)
- Real estate documents, including property deeds
- Medicare or Medicaid documentation
- List of regular monthly expenses

## 3. Estate Planning Documents:

- Existing wills and trusts
- Powers of attorney
- Health care directives

## 4. Insurance Policies:

- Long-term care insurance
- Life insurance

- Showing face value, owner, and beneficiary of each

5. Legal Documents:

- Any legal judgments or court orders
- Any ongoing legal matters

6. Questions and Concerns:

- A list of questions or concerns you would like to ask the attorney.

7. Funeral and Burial Plans

- Information on any pre-arranged funeral or burial plans

8. Long-Term Care Planning

- Information on nursing home or assisted living arrangements

**Please keep in mind that this list may vary based on individual circumstances. Knox Law has a specific Elder Law questionnaire for new clients, to help organize the information for an efficient meeting. We are committed to help you effectively plan for your future.**

**If you have further questions, or would like to schedule an appointment, please call us at 814-459-2800.**

*[Chrissy Vroman](#) is our dedicated Elder Law paralegal, working closely with clients to achieve their goals in an efficient and effective manner.*



### **Jerome C. Wegley**

Jerome C. Wegley's practice focuses on asset protection and business succession planning. He helps people protect their assets from taxes, creditors, future ex-spouses and ex-in-laws, and nursing homes, so they may choose who benefits from their assets (themselves, their children, charities, etc.).

[jwegley@kmgslaw.com](mailto:jwegley@kmgslaw.com)

814-923-4907



## Jeffrey D. Scibetta

Jeffrey D. Scibetta focuses his practice on elder law planning, complex estate planning and administration, business & tax planning, and real estate. He has spoken to a variety of groups and professionals about all of these matters.

[jscibetta@kmgslaw.com](mailto:jscibetta@kmgslaw.com)

814-459-2800

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