Knox McLaughlin Gornall & Sennett, P.C.
Erie • Pittsburgh • Jamestown, NY
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What to Bring to Your Elder Law Appointment

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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.

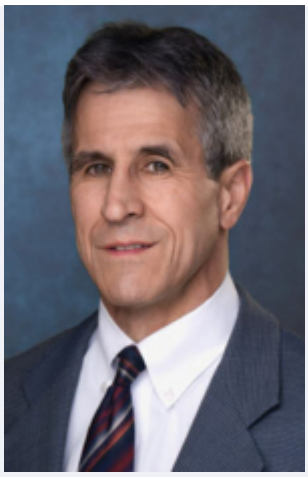


Jerome C. Wegley

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.).

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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.

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