

# TRAINING THE NEXT IN CHARGE

Courtesy of the Elder Law Firm of Anderson Associates, P.C.

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When you lose capacity due to a decline in memory or mobility who will pay your bills and handle other financial affairs; and who will advocate for your health care or make sure your wishes are honored on life support? Upon your death, who will administer your estate or trust?

A professional trust office may be the best solution for larger estates valued over \$500,000. However, most clients prefer to appoint family members who are usually untrained and inexperienced to handle these important *fiduciary* roles of trust and power.



Without the proper training of your agent under power of attorney (POA) for health care, the quality of your health care and the assurance that your wishes are honored are at risk when you can no longer fend for yourself.

Without the proper training of your agent under financial POA, the risks of not getting your bills paid, financial exploitation, and your risk of losing assets upon admission to a nursing home are increased.

Without proper training, your Successor Trustee or other estate administrator may make a tax mistake, cause undue delays, or fail to protect against creditors.

## We Have Two Solutions

The first solution we offer is a DVD on "Training the Next-in-Charge". In this 50 minute DVD, you will see how we trained two U.P. families on how to serve as agents under POA's and as Successor Trustees. The cost of this DVD is \$100.



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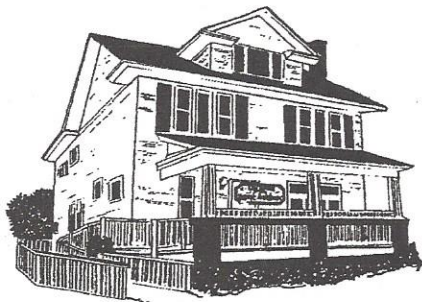
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The second solution we offer is a 1½ hour training session with all family members using our “Training the Next-in-Charge” workbook which explores 12 key scenarios on incapacity and post-death situations. At the session you and your family members are invited in person or by conference call. Harmony planning is also addressed in the session. This session costs \$300.



For more information contact us at (906) 228-6212 or toll free in the U.P. at 1-877-304-3119, or by email at [upelderlaw@upelderlaw.com](mailto:upelderlaw@upelderlaw.com).

Visit our new and improved website at [www.upelderlaw.com](http://www.upelderlaw.com).



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*For Your Peace of Mind*