

A Note From Peter...

The following is a short article written by Alexis Martin Neely. I believe the message is perfectly fitting for this time of year- the transition into the summer season always gets me thinking about how I can improve myself and the way I think and work.

-Peter J. Gilbert



Progress Not Perfection
by Alexis Martin Neely

As I mentioned in an earlier post, I had surgery two and half weeks ago - back surgery to be exact. While the recovery is going well, it still takes patience. I am the first to admit that I have no patience when it comes to being injured. As I'm sure many of you can relate, it's frustrating when the body doesn't do what it's supposed to. I constantly remind myself that it's about progress, not perfection.

I realized that the same mantra could be applied to estate planning. As a Personal Family Lawyer, I hear time and time again from new clients that they had been putting off meeting with an attorney about protecting their family because they thought it would be difficult, drawn out, complicated and expensive. In their minds, they are envisioning a "perfect" estate plan, and assuming it will be huge and overwhelming.

"Progress" should be the goal. While it might be great to come out of the gate with a living trust, wills, powers of attorney, health care proxies, Kids Protection Plan, and if appropriate a life insurance trust, limited liability entity, and any number of other tax planning tools, comprehending all this in a first meeting can be confusing. You would and should be overwhelmed.

Estate planning is meant to be a work in progress. A plan should be reviewed annually, and updated as appropriate. Start with a foundation plan - the minimum necessary to protect your family and loved ones from probate and unnecessary taxes. Plan with your attorney to build upon that at least annually by adding components that will further protect against creditors and predators.

Over time, your estate plan will become a strong fortress of protection for you and your family. You'll reduce your stress, and have the side benefit of effectively paying for your plan in installments.

Don't put off your planning. Think progress, not perfection.

UPCOMING EVENTS

***Please join us on May 29th, 2009 at 6:00pm** for our next Kids Protection Plan workshop at The Little Gym in Springhouse! Great information, food, and plenty of fun for the kids will be provided! Space is limited and going quickly so sign up for this event now by going to the Upcoming Events page at www.highpointlawoffices.com or by calling our office at 215-997-9773.

***Friday, June 12th from 6:30pm to 8pm** at the Let's Bounce Around in Doylestown, we will be hosting another free, informative workshop for parents to learn how they can protect their biggest asset, (their children!), in case the unthinkable should happen. Plenty of great information, food, and fun for the kids will be provided! Space will be limited so



FEATURE ARTICLE

Caring for Your Parents; Caring for Yourself

By: Betty Long

President and Founder

Guardian Nurses Healthcare Advocates, Inc.

Adult children can help their parents while also helping them maintain their independence and dignity. Begin by having honest conversations, early and often. Try to understand what is important to them. Be realistic. Most importantly, care for yourself so you can be there to help your loved one. Here are a few tips to help:

1. Take care of yourself. If you don't take care of yourself, you can't take care of others.
2. Talk early and often with your parent. Many older Americans are private about their personal lives. Initiate the conversation by discussing how you're planning for your own future, or elicit a doctor's help in starting the conversation. Elderly people often are more receptive to their doctor's promptings about living wills and health care proxies than when their children raise the issue. Once prompted, they often will act.
3. Don't make promises you can't keep. Most people want to age in the place they call home, but that's not always feasible. Ask your loved ones what their goals are. Talk about what can be done to help them age gracefully at home as long as possible. Ask who they would trust if they lose the ability to make decisions.
4. Remember your spouse or partner. Don't feel guilty about your taking time to be with the people who care about you.
5. Use humor. To get my father to use his walker, I once told him, "If you fall and break your hip, my reputation as a nurse advocate will be ruined."
6. When others ask what they can do, take them up on it. Be practical. Have a list ready. Assign them a task.
7. Achieve a balance of what your parent can do and what you can do for them. One client had a routine every Saturday where she visited her mom. She wrote out her checks, but her mom was still making the decisions; and the daughter took comfort in knowing that mom's bills were being paid on time.
8. Acknowledge the efforts of siblings who have the day-to-day care. A simple thank you goes a long way. Even if you're at a distance, consider making doctor's appointments or arrangements for help in your parent's home, transportation, or Meals on Wheels. Make frequent phone calls to your mom or dad; older people are often lonely. If it's difficult for them to communicate by phone, mail them a quick handwritten note. Let them know you're thinking about them.
9. Use community resources. Many local nonprofit organizations and government agencies are dedicated to helping both seniors and their caregivers.



UPCOMING EVENTS CONTINUED...

please call 215-997-9773 to register for this event.

Visit www.letsbouncearound.com for more information on the Let's Bounce Around facility.

***Tuesday, June 16th at 10:30am AND 6pm** for a FREE asset preservation and living trust workshop at our office in Chalfont! Let us show you how the down market provides a unique opportunity to protect your assets from nursing homes in less time! You have protected your family for years, and still can. Space will be limited. Please call to reserve your seat today!

CONTACT US!

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