



WHAT HAPPENS IF I BECOME INCAPACITATED?™

Estate planning is not only about what happens after you die.

WHAT DOES “INCAPACITATED” MEAN?

Sometimes an illness, injury, or other circumstance can leave a person unable to manage financial matters or make and communicate healthcare decisions. Planning ahead lets you think about who you would trust to help and what you would want them to know.

THIS IS ABOUT PREPARATION, NOT PREDICTION.

No one knows whether incapacity will happen. The purpose of planning is simply to make important decisions while you are able to make them, rather than leaving the people you love to guess during a difficult time.

FOUR PRACTICAL QUESTIONS

1. Who could handle my financial matters?	Think about who you would trust to manage bills, accounts, property, and other financial responsibilities if you could not handle them yourself.
2. Who could make healthcare decisions?	Think about who could listen to medical information, communicate with healthcare providers and family, and make decisions consistent with your wishes.
3. Would the people I chose know what I want?	Choosing someone is only part of the preparation. Consider whether that person understands your priorities, wishes, and the responsibility you may be asking them to accept.
4. Could they find what they need?	Important documents and information should be organized so the people who may need them know where to begin. They do not need access to everything today, but they should not have to search blindly during a crisis.

IF I COULDN'T HANDLE THINGS TOMORROW...

- I know who I would want helping with my financial matters.
- I know who I would want making healthcare decisions.
- The people I chose know I have chosen them.

- My healthcare wishes are documented.
- My financial and estate-planning documents are current.
- The right people know where important documents can be found.

DOCUMENTS THAT MAY BE PART OF INCAPACITY PLANNING

Financial Power of Attorney	May authorize someone to handle financial matters when the document permits them to act.
Healthcare Power of Attorney	May identify the person authorized to make healthcare decisions when you cannot make or communicate them yourself.
Living Will / Healthcare Directive	Can record healthcare and end-of-life wishes for circumstances addressed by the document.
Revocable Living Trust	A properly established and funded trust may provide a structure for managing trust property if the person creating the trust becomes unable to manage it.

THE BIG IDEA: Estate planning is not only about leaving things behind. It is also about making sure the people you trust can help when you need them, with enough information and direction to act with confidence.

NOT SURE WHETHER YOUR CURRENT PLAN COVERS THESE QUESTIONS?

Bring your questions to a complimentary **Family Legacy Review™**. We can help you understand what you already have and identify what you may want to review.



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