JULIAN GRAY ASSOCIATES

CERTIFIED ELDER LAW

AVOID MISTAKES. PROTECT ASSETS.

ELDERCARE PLANNING WORKSHEET

(PLEASE COMPLETE THIS PACKET IN INK)

This information packet must be returned to us at least three days prior to your meeting (this will ensure we have enough time to understand the specifics of your situation before our meeting). If you need assistance completing the information, call our office (412.269.9000) and we will help you.

DON'T WORRY ABOUT TOTAL ACCURACY – JUST DO THE BEST YOU CAN

WE LOOK FORWARD TO SEEING YOU!!!

ALL INFORMATION PROVIDED IS STRICTLY CONFIDENTIAL

Moon Township Office
1187 Thorn Run Road Ext., Suite 400
Moon Township, PA 15108
Phone: 412-269-9000

South Hills Office
2535 Washington Road, Suite 1111
Pittsburgh, PA 15241
Phone: 412-833-4400

www.GrayElderLaw.com
Fax: 412.269.9003

ELDER CARE PLANNING QUESTIONNAIRE
(SINGLE)

PLEASE BE AWARE no attorney client relationship has been formed by completing or not completing this questionnaire. If we do not receive your completed questionnaire within **thirty (30) days** from the date of receipt, we will close your file and Julian Gray Associates will take no further action on this matter.

Today's Date _____

This form is extremely important. Your accuracy and completeness in responding will help us to assess your situation.

A. PERSONAL DATA

Full Name _____

Street Address _____

City _____County:_____ State _____ Zip_____

Telephone Number: _____ Email _____

Birth Date _____ Social Security No. _____

U.S. Citizen? Yes ☐ No ☐ Veteran? Yes ☐ No ☐
Date of Discharge: _____

If widowed, please list name of spouse and date of death:

_____ _____
(Name of deceased spouse) (Date of death)

Was your former spouse a Veteran? Yes ☐ No ☐
If so, Date of Discharge from service: _____
If available, please return a copy of military discharge papers with this questionnaire.

B. MEDICAL DATA

1. PHYSICIAN

Full Name of Primary Physician _____

Street Address _____

City _____ State _____ Zip _____

Telephone Number:_____

FOR FIRM USE ONLY:

LE		
CLR	CAV	FMV

RE#2		
CASE TYPE		
AF		

2. STATE PHARMACEUTICAL PLAN

Are you currently on PACE or any other state pharmaceutical plan? Yes ☐ No ☐

C. MONTHLY INCOME

**Do not include interest and dividend income on this form.*

Social Security Benefits (include Medicare Part B Deduction, if applicable)	$_____
Retirement Benefits (Gross)	$_____
Veterans Disability Income	$_____
Annuity Income	$_____
Rental Income	$_____
Other Income	$_____
TOTAL MONTHLY INCOME	$_____

If there is a pension, please list the **gross pension amount, including any monies deducted for federal income taxes, health insurance or any other reason.*

Could this pension amount increase in the future? Yes ☐ No ☐

*COMPLETE SECTION D ONLY IF ALREADY RESIDING IN A FACILITY.

D. MONTHLY COST OF INDEPENDENT/ASSISTED LIVING FACILITY/NURSING HOME

**Please indicate Independent Living, Assisted Living or Skilled Nursing Facility*

Name of Facility:_____

Facility Address:_____

City_____County_____State_____Zip_____

Telephone Number_____

Monthly Cost	$_____
Monthly Prescription Cost	$_____
Monthly Incontinent Cost	$_____
Monthly Other Cost	$_____
Total Monthly Cost	$_____

Date entered facility _____ (month/day/year).

Medicare coverage ended / will end _____ (month/day/year)

The facility is paid through _____ (month/day/year).

E. ADDITIONAL CARE GIVING SERVICES NEEDED

I need assistance with the following:

Assistance with bathing	Yes □	No □
Standing and sitting	Yes □	No □
Getting in and out of bed	Yes □	No □
Eating	Yes □	No □
Walking	Yes □	No □
Dressing and undressing	Yes □	No □
Taking medication	Yes □	No □

Who is receiving care: _____

Name of Caregiver/Agency providing care: _____

How many hours per day / days per week is care received:_____

Monthly cost for care (if any) $ _____.

F. MONTHLY NON-SHELTER LIVING EXPENSES

Please list any significant monthly non-shelter living expenses not disclosed in D above:

_____

_____

_____

G. GIFTS

Have you made gifts in excess of $500 in any one month, to an individual or group of individuals, within the past 60 months, or to a trust within the past 60 months? Yes □ No □

If yes, list below:

Recipient _____ Date _____ Amount _____

Recipient _____ Date _____ Amount _____

Recipient _____ Date _____ Amount _____

Recipient _____ Date _____ Amount _____

Recipient _____ Date _____ Amount _____

Have you ever filed a Federal Gift Tax Return? Yes □ No □

If so, for what calendar year(s)? _____

H. LIFE INSURANCE/LONG TERM CARE INSURANCE

Name of Insurance Company ________________________________ Policy # _______________________

Street Address ____

City ____________________________________ State _______________ Zip ______________

Type of Policy ___________________________ Owner ________________________________

Insured ________________________________ Beneficiary ____________________________

Death Benefit: $________________ Face Value $_________________ Cash Value $_____________

Name of Insurance Company ________________________________ Policy # ________________________

Street Address ____

City ____________________________________ State _______________ Zip ______________

Type of Policy ___________________________ Owner ________________________________

Insured ________________________________ Beneficiary ____________________________

Death Benefit: $________________ Face Value $_________________ Cash Value $_____________

Name of Insurance Company ________________________________ Policy # _______________________

Street Address ____

City ____________________________________ State _______________ Zip ______________

Type of Policy ___________________________ Owner ________________________________

Insured ________________________________ Beneficiary ____________________________

Death Benefit: $________________ Face Value $_________________ Cash Value $_____________

Name of Insurance Company ________________________________ Policy # ________________________

Street Address ____

City ____________________________________ State _______________ Zip ______________

Type of Policy ___________________________ Owner ________________________________

Insured ________________________________ Beneficiary ____________________________

Death Benefit: $________________ Face Value $_________________ Cash Value $_____________

I. CHILDREN (if applicable, including adult children) **I have no Children** ☐

Name of Child _____

Street Address _____

City _____ State _____ Zip_____

Phone Number _____E-mail Address _____
Date of Birth _____

Name of Child _____

Street Address _____

City _____ State _____ Zip_____

Phone Number _____E-mail Address _____
Date of Birth _____

Name of Child _____

Street Address _____

City _____ State _____ Zip_____

Phone Number _____E-mail Address _____
Date of Birth _____

Name of Child _____

Street Address _____

City _____ State _____ Zip_____

Phone Number _____E-mail Address _____
Date of Birth _____

Are all of your children in good health? Yes ☐ No ☐
Are any of your children blind? Yes ☐ No ☐
Are any of your children disabled? Yes ☐ No ☐
Are any of your children receiving SSI or other form of government entitlement? Yes ☐ No ☐
Do any of your family members have any problems with: Aids? Yes ☐ No ☐
Drug Addiction? Yes ☐ No ☐
Alcoholism? Yes ☐ No ☐
Spendthrift? Yes ☐ No ☐

Do any of your children live with you in your home? Yes ☐ No ☐

If yes, name of child _____

Does a sibling live with you in your home? Yes □ No □

If yes, name of sibling _____

Is anyone in your immediate or extended family disabled (including any spouses of your children): Yes □ No □

If yes, name and relationship of disabled family member_____

J. YOUR ADVISORS: **Name** **Telephone No.**

Accountant _____ _____

Life Insurance Agent _____ _____

Investment Advisor _____ _____

Other Attorney _____ _____

Other Consultant or Advisor _____ _____

K. CURRENT ESTATE PLAN

Do you have any of the following estate planning documents?

Last Will & Testament Yes □ No □

Financial/General Durable Power of Attorney Yes □ No □ if yes, Agent: _____

Healthcare Power of Attorney/Living Will Yes □ No □ if yes, Agent: _____

Trusts Yes □ No □

If yes, name of Trust: _____

☐ I do not have any current estate planning documents.

L. MISCELLANEOUS

Do you own an irrevocable burial account? Yes □ No □

Do you have a Medigap policy (supplemental health insurance)? Yes □ No □

If yes, please list the name of the provider _____

and monthly premium $ _____

Do you have any other legal issues which I should be aware of? Yes □ No □

If yes, please explain.

_____

_____

M. REFERRAL

By whom were you referred to this office?

Name _____

Company Name:_____

Street Address _____

City _____ State _____ Zip _____

Have you visited our Website? Yes □ No □

Do you have any ideas for improving our Website? If so, please discuss.

_____

_____

N. CERTIFICATION

The undersigned hereby represents to Gray Elder Law, LLC, and each of its attorneys that the information contained in this intake form is accurate and complete, and that the undersigned understands that the law firm and its individual lawyers will rely on this information. I understand that if the information contained herein in inaccurate or incomplete, the recommendations made by the law firm may not be appropriate.

Signature of Client or Client Representative:

_____

Although reasonable value approximations are acceptable, it is important to be certain of the identity of <u>all</u> assets and <u>how they are owned or titled</u>. This Questionnaire provides for identification of assets as owned solely by wife, solely by husband, or as co-owned (either with a spouse or with another).

ASSETS/LIABILITIES

Please insert the value of each asset/liability in the appropriate space.

ASSETS	SELF	JOINTLY HELD FUNDS	LIABILITIES
Personal Effects/Household Items	$	$	$
Automobile	$	$	$
Checking Account	$	$	$
Savings Account	$	$	$
Money Market Account	$	$	$
Certificates of Deposit	$	$	$
Residence (Assessed Value) Block #_____ Lot #_____ (Obtain from Tax Bill)	$	$	$
Other Real Estate	$	$	$
Additional Automobiles	$	$	$
Mutual Funds	$	$	$
Stocks	$	$	$
Bonds	$	$	$
Annuities	$	$	$
Cash Value - Life Insurance	$	$	$
IRA	$	$	$
Nursing Home Deposit	$	$	$
Other	$	$	$
Other	$	$	$
TOTALS	$	$	$

What did you pay for your current home including any improvements? $_____

Do you own any real property other than personal residence? _____

Address:_____