

SENIOR LAW DAY COLLABORATIVE

ZOOM WEBINAR

**HEALTHCARE & ESTATE
PLANNING WITHOUT AN
OBVIOUS REPRESENTATIVE**

Wednesday, January 25th, 2023
at 10:00 am

*Barbara Newman Mannix, A Dignified Life
Deepankar Mukerj, Esq., Elder Law Attorney*

**What is it like to be
faced with making a
life decision alone?**



SENIOR LAW DAY
COLLABORATIVE

WHAT YOU NEED TO KNOW
TO AGE SMART

**HEALTH CARE AND
ESTATE PLANNING
WITHOUT AN OBVIOUS
REPRESENTATIVE**

**JANUARY 25TH, 2023
10:00 AM**

Presented by:

Barbara Newman Mannix, *A Dignified Life, LLC*

Deepankar Mukerj, *Elder Law Attorney*

seniorlawday.info

Organize Your Thoughts (Conversation Project)

- Don't panic
- What are Advanced Directives?
- When should I have the conversation?
- What are your goals?
- Religious considerations
- Advanced Arrangements (funeral)
- Where do I stand now?



Be Open to Getting to Know Someone for this Specific Reason

- Identify your team captain.
- Be transparent as to why you desire this person to represent you.
- What matters most?
- *Once* is not enough.



Who is in Your Inner Circle?

Who is your team?

- Healthcare professionals?
- Clergy?
- Close friends?
- Attorney?
- Financial advisor?
- Conversation project
(<https://theconversationproject.org/get-started>)

Ask Permission

- After you identify your wishes.
- After you identify a possible representative.
- After you identify your goals.
- After you understand your perspective.
- Approach your prospective representative and discuss your desires by "asking permission."

**Be
Persistent**

- *Once* is not enough.
- Revisit your goals.
- Refine your "ask."

Pitch a Good Listener

- Does this person you've identified have patience?
- Do they exhibit compassion?
- Do they exhibit respect?
- Do they avoid interrupting?
- Only interjects to embrace the subject.
- Are they curious about you?



Pick Someone You Know Will Honor Your Wishes

- Is your prospective representative sincere?
- Do they exhibit open-mindedness?
- Do they ask the right questions?
- Are they trustworthy?
- Are they informed?
- Not self-centered.



Seeking Professional Advice: "Living Way"

- What does "Living Way" mean?
- Revisit and Refine
- *Once* is not enough.
- Healthcare Professionals
- Clergy
- Financial Advisor
- Attorney