

The 6 Critical Questions

to Ask BEFORE
Hiring An

Elder Law Attorney

Provided by:

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Why This Decision is So Important

Hiring the right Elder Law, Estate Planning, or Nursing Home Planning attorney can be one of the most important decisions you make.

When you make the right decision, you will save a lot of time, money, and energy. Your planning will be a breeze...and you will find (as is true for most cases) you save more than you invest.

Alternatively, if you choose to hire the wrong attorney, your troubles have just begun. We cannot begin to tell you how many horror stories we have heard from well-meaning people like you who hired a “fly by night” firm, or used some documents they found online, to cover their long-term needs. In an attempt to save a few bucks, they lost a lot of time... and missed many opportunities.

The 6 questions in this report outline what to look for in an attorney who specializes in Estate Planning, Trust, and Nursing Home Planning. Use them as your guide to navigate the troubled waters. Above all, use the questions to show you who will give you the specialized care that you or your family member deserves.

**Every case is different.
Every person requires special attention.**

Sadly, the persistent (and even offensive) advertising from many law firms often leaves you, the consumer, with a loss as to where to go to find good, competent help.

That’s why we wrote this Special Report for you.

- First, we understand that you care deeply about your loved ones.
- Second, we know that you are looking to make the right decision.
- Third, we know that you are busy and do not have “all day” to figure this stuff out.

That’s why we have put together this Special Report. It will arm you with the right information to make the best decision when it comes to your needs (or your parent’s needs). If, after reading the Special Report, you find that our firm meets your needs, that’s great and we would be glad to help. However, if you choose to find another law firm (and you base that decision on what you read here), we will have accomplished our mission too. That’s because we truly understand your situation, we do care about you, and (more than anything) we want you to find a firm that meets your specific needs.

So, let’s get started. Here are the 6 things you must ask an attorney before choosing to work with them for your estate planning and elder care needs.

Question #1

Are you qualified to help with Estate Planning AND Nursing Home Planning?

Why is this so important? Simple: there are many lawyers who may be qualified to help you with Estate Planning, but who do not understand Nursing Home Planning.

Even if you think you only need one of these services, you want to hire an attorney that focuses on both. That's because more times than not, a good attorney will be able to find you money, support, or programs in an area that you did not even know was available!

So, be sure to ask a prospective attorney if he or she has experience handling Estate Planning and Nursing Home Planning.

Question #2

Is timely service delivered...and how is it delivered? How long can I expect to wait?

When dealing with the long-term needs of your family or a loved one, the last thing you want to do is to be treated like a "number." You want specialized, personal, 1-on-1 care. You want someone who cares about you and your family. And, more than anything, you want a firm with the expertise to get the job done right.

With many "big box" firms (and even some small ones), it can take weeks to get an appointment. And then your case file may get lost in the shuffle of their really big cases, you may just get sent off to a clerk, and your care suffers as a result.

Most firms will promise timely service, but be sure to ask them exactly what you can expect. Ask how long the service will last. Ask them how long until you can expect to be seen and how long it will take for action on their case.

If you miss this question, it could be months before you realize you hired the wrong attorney.

Question #3

Are any of the Attorneys Board Certified in Estate Planning, Trust, and Probate Law by the Ohio State Bar Association?

The Ohio State Bar Association designates some attorneys as specialists in Estate Planning, Trust, and Probate Law. To achieve this designation, the attorney must be peer reviewed by fellow attorneys and judges; have thousands of hours of experience; and pass a rigorous examination. There are over 47,000 lawyers in Ohio. Less than 150 are designated as experts in Estate Planning, Trust, and Probate Law by the OSBA.

To put it bluntly, if an attorney says they work in Elder Law or Estate Planning, but they are not recognized as a specialist, there is a reason why.

And that reason could spell trouble for you and your case if you choose to work with them.



Question #4

How many living trusts does the attorney set up each month?

Even if you don't think you (or your loved one) needs a living trust, you still want to ask this question.

Living trusts are a more sophisticated type of planning option than simple wills. They avoid probate and its fees, delays, and publicity. They protect vulnerable beneficiaries who may be in a divorce or bankruptcy, suffer from a mental health or gambling disorder, or battle a drinking or substance abuse problem. Living trusts also help to reduce or eliminate federal estate taxes.

Be sure to find an attorney who sets up a lot of living trusts. This means the attorney is experienced in dealing with the most challenging estate planning cases. Even if your case is not that difficult, it pays to have someone who is highly qualified handling your case. You may have a case that requires more work than you think. It's best to go with an attorney who is used to dealing with the harder cases and does a lot of them. Even if your case turns out to be simple, you can have the peace of mind knowing you chose a lawyer who is well qualified to get it done right.

Question #5

How many Medicaid cases do you handle each year? What percentage of Medicaid planning cases do you take? And how many appeals do you have to file on those cases?

Whether or not you think your case will qualify for Medicaid, you still want an attorney who is competent and experienced at handling these cases. Medicaid benefits, when rightly applied, can make a huge difference in the amount of money you or your family will pay for a loved one's care.

Question #6

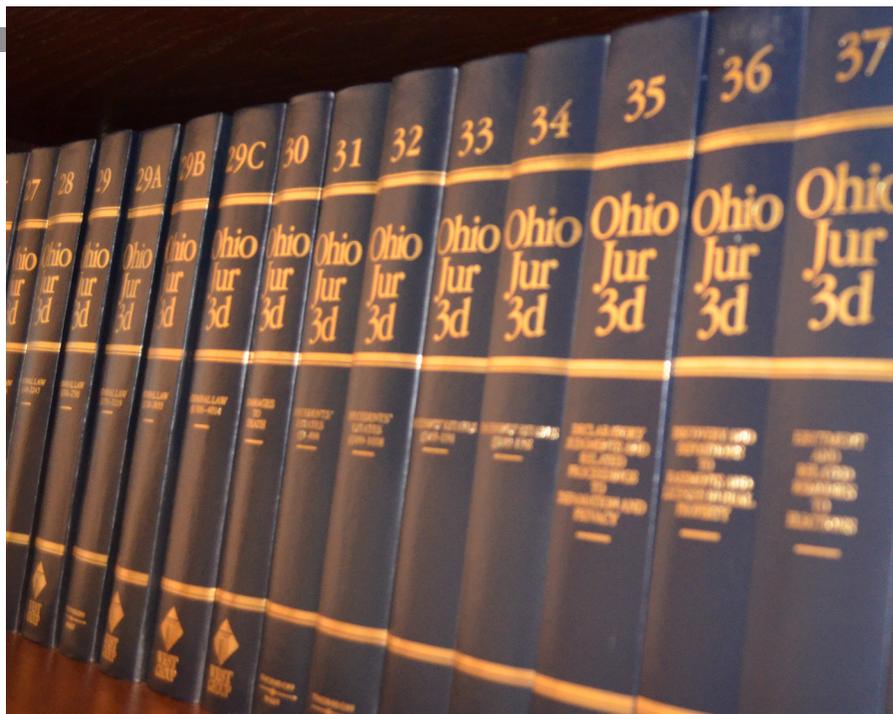
Who will I be interacting with at your firm?

This last question could be the most important one you ask. Many law firms will shove you off to work with a clerk for weeks on end...and you may only get one meeting (if that) from the actual attorney. The fact is, you want to find a firm where the attorney has set aside time to get to know you and your family member and to work with you personally, 1-on-1.

While every firm will have clerks and assistants doing work on your case (ours does), you still want to get face-to-face, real access to your attorney. There is nothing like it.

**That's why we always make it a point to get to know
our clients as people - as real human beings.**

**Not only does this help them, but it greatly assists our team in getting them
the benefits, help, and long-term care that they deserve.**



Summary

When considering an attorney who specializes in Elder Law, Estate Planning, or Nursing Home Planning, be sure that you ask ALL of the above 6 questions.

**How an attorney answers these questions
will tell you a lot about how they will
handle your needs.**

Don't be afraid to ask these 6 questions. From experience, our firm never has a problem when a prospective client is detailed in asking us questions like this (or others). Not only are we confident that we meet all 6 of these qualifications, but it also tells us that they are serious about finding the right planning or care for themselves or for a loved one.

If you want to fast-track the process and are looking for a firm that is competent in all areas of the law mentioned above, a firm who holds to the highest ethical standards, and who cares deeply for the your needs and concerns, then please give us a call. There's no obligation and no fine print. From experience, we know that no firm will serve you better. But we'll let you be the judge of that.

To get your specific questions answered, call the number below. And we look forward to helping you or your loved one move into this stage of life.

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