

## ELDER / DISABILITY LAW AND PROTECTION INFORMATION

**PRIVACY:** Your privacy and confidentiality will be honored.

### **BASIC INFORMATION NEEDED FOR ELDER / DISABILITY LAW AND PROTECTION MATTERS:**

Name of the person in need of assistance, as it appears on formal documents and accounts:

Marital Status:

Your name and relationship to this individual:

What type of issue would you like to address? For example, preparing a plan for protection and care of this individual, preparing documents for managing the person's financial affairs, preparing a will or trust, etc..

Do you and the involved party agree about how to handle this?

Have you or the involved party taken any action on this? For example have papers been prepared, an attorney contacted, or is someone currently in charge of the financial affairs,?

Is there any missing property, physical or emotional abuse, homelessness, or other similar issue?

How soon does this need to be completed?

Are there any barriers to completing this quickly? Such as impairment, uncertainty about what the individual wants to do, disagreement among others who are involved, etc.

Do you want to be contacted to begin this process?

How would you like to be contacted? By phone or e-mail? Can this be accomplished confidentially?

**Remember: These matters can take some time to fully study, take action, and complete the necessary steps. If you want to proceed, it is important to prioritize this matter and follow through.**

**No attorney-client relationship is formed until a written retainer agreement has been signed and any payment received.**