



How to Pick an Estate Planning Attorney

A Simple Checklist for Families

Choosing an estate planning attorney is an important decision. The right attorney helps you plan for your life now, your care as you age, and what you leave behind.

Use this checklist to help you choose wisely.

1

They Plan for Life, Not Just After Death

A good attorney helps you plan for:

- Getting older
- Illness or memory problems
- Who makes decisions if you cannot
- How you will get care

Ask: *“Do you help families plan for aging and care?”*

2

They Understand Long-Term Care

Your attorney should know about:

- Care at home
- Assisted living
- Nursing homes
- How care is paid for
- Medicaid and other benefits

Ask: *“How do you help plan for long-term care?”*

3

They Help You Avoid Emergencies

Good planning can help families avoid:

- Last-minute decisions
- Court problems
- Stress and confusion

Ask: *“How does planning now help avoid problems later?”*

4

They Work With Other Helpers

Estate planning works best with a team. Your attorney should work with:

- A CPA (tax help) and a financial advisor (money planning)
- A geriatric care manager (care help)
- Community programs and resources

Ask: *“Do you work with other professionals?”*

5

They Focus on What Really Happens

Your plan should:

- Work when it is needed
- Match your real-life situation
- Help your family know what to do

Ask: *“How do you make sure the plan works in real life?”*

6

They Care About Your Life and Your Legacy

A good attorney helps protect:

- Your comfort and dignity
- Your care choices
- Your family
- What you leave behind

Ask: *“How do you help families meet their life and legacy goals?”*

7

They Stay With You Over Time

Life changes. Your plan should too. Look for an attorney who:

- Explains things clearly
- Gives you written next steps
- Offers future check-ins

Ask: *“What happens after we sign the papers?”*

Remember!

The right estate planning attorney is a trusted guide.

They help you plan for care, support your family, and protect what matters most.

If you have questions about aging, care, or planning for the future, learning your options can be a helpful first step. Talking with an experienced estate planning attorney can bring clarity, comfort, and peace of mind.

Good planning helps families feel prepared — one step at a time.