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Your Trusted Planning Advisor Through Life

**Estate & Incapacity
Planning**

- ◆ Probate & Trust Administration
- ◆ Last Will & Testament
- ◆ Revocable Trust
- ◆ Durable Power of Attorney
- ◆ Designation of Healthcare Surrogate
- ◆ Quit Claim Deed
- ◆ Living Will

Advocacy Services

- ◆ Guardianship & Guardian Advocate
- ◆ Facility Residents' Rights
- ◆ Medicaid Applications & Appeals
- ◆ Veterans Benefits Counseling

Government Assistance

- ◆ Special Needs Trusts
- ◆ Representation of Trustees
- ◆ Protecting Lawsuit Proceeds & Inheritances to Preserve Medicaid & SSI Eligibility
- ◆ Exceptions to Medicaid Lien Recovery

*Proper Planning
May Create Peace
of Mind*

DOMESTIC PARTNER PLANNING

Stephanie L. Schneider, Esquire

People tend to avoid dealing with issues of illness, death and mortality. The laws in Florida as well as the United States generally do not provide your clients who may be same sex and heterosexual partners with the same rights as married couples. Therefore, it is even more important that advance planning be undertaken by domestic partners.

Here are the top ten reasons why domestic partners engage our office to assist them with advance planning:

1. To ensure that the domestic partner has legal authority as the **Designated Health Care Surrogate** to make the other partner's medical decisions in the event of their incapacity.
2. To assure that the domestic partner has legal authority as agent under a **Durable Power of Attorney** to make the other partner's financial decisions in the event of incapacity.
3. To assure that the domestic partner will inherit the portion of the other partner's estate in a **properly drafted estate plan**.
4. To assure that both partners have taken advantage of all possible benefits available by purchasing **long term care insurance offered through employment**.
5. To be educated about arranging maximum benefits available under **employee benefit packages** prior to retirement.
6. To ensure that the domestic partner has a **protected interest in the home** they share.
7. To ensure that both partners have taken advantage of the maximum **health care benefits available under both employees' health plans**, where permitted.
8. To be confident that partners have taken advantage of benefits available by purchasing **long term care insurance when offered to domestic partners**.
9. To ensure their privacy is maintained and **limit the possibility of family pursuing a legal guardianship**.
10. To assure that partners **properly designate beneficiaries on assets** to avoid probate.