



Gravis Law

Estate Planning Essentials:

A Roadmap to Securing Your Legacy

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Introduction

**Ages
&
Stages**

**Social
Security
Disability**

**Estate
Planning**

Caretaking

**Caretaking
Alternatives**



Randi Johnson

Randi Johnson is a dedicated professional with a passion for public service and community engagement. Her journey into law was fueled by a desire to make a positive impact and assist others in navigating legal matters. As Chief Engagement Officer at Gravis Law, Randi focuses on supporting attorneys in developing their practices while overseeing marketing and communications efforts.



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What to keep tabs on:

- Financial
- Medical/ Health
- Social/ Emotional
- Housing
- Caregiving
- Vocation/ Employment

Let's talk about the intersection of all of these as they are impacted by laws and regulations.



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Benefit

S Government program meant to support a child with limited household income and as an adult, to provide income and medical insurance coverage.

- Stages of the Social Security disability claims process

Definition of Disabled with Child SSI –

- How you meet that definition –
 - As compared to same aged peers
 - Evidence required

Transition to adulthood – child SSI to adult SSDI/ Adult program eligibility is not the same: DAC, SSDI, and SSI

Disabled Adult Child Benefits

- Eligibility & Evidence
- Benefit Amount

SSDI v SSI

- Eligibility
- Standard of proof/Evidence
- Benefit Amount



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Estate Planning

Estate Planning involves the legal tools and documents that support a person's legal rights to their assets, nomination of decision-makers, and end of life intentions



Will



Power of Attorney



**Healthcare Directive
(Living Will)**



Special Needs Trusts

- Testamentary vs. Standalone (3rd party)
- ABLE accounts (1st party)



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Decision-making and Caretaking:

Guardianship/ Conservatorship



- Gaining authority from the court to manage the personal, medical, and/or financial affairs of another person.
- Authority is only granted if the other person is found to have sufficiently diminished cognitive and/or physical capacity.
- This is a court proceeding.

Guardianship is authority to manage personal matters (where the incapacitated person lives, whom they associate with, their medical care, educational issues, etc.)

Conservatorship is authority to manage financial matters (income, assets, liabilities, etc.)



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Alternatives to: Guardianship/ Conservatorship



Power of Attorney

- This is ideal if the person still has sufficient capacity.
- Biggest differences are that as their agent you would be working for the principal, not over them. They get final veto power and can remove you as POA any time they like.

Supported Decision Making Panel (MicroBoards!)

This is a new concept, but in theory a panel of trusted people can be granted a certain degree of power to assist the person with diminished capacity with their decision making.

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Questions?

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