

CONTENTS

| | |
|--|----|
| Paul J. Corsaro <i>Partner, Bingham McHale LLP</i> <i>A CLIENT-ORIENTED APPROACH TO ESTATE PLANNING</i> | 7 |
| Bernard A. Krooks <i>Founding Partner, Littman Krooks LLP</i> <i>CREATING AN ASSET PROTECTION PLAN FOR ELDER LAW CLIENTS</i> | 15 |
| Susan J. Link <i>Partner, Maslon Edelman Borman & Brand LLP</i> <i>TRANSFERRING ASSETS TO THE NEXT GENERATION: STRATEGIES FOR EFFECTIVE ESTATE PLANNING</i> | 25 |
| Sanford J. Mall <i>Founder and Senior Partner, Mall Malisow & Cooney PC</i> <i>ELDER LAW ESTATE PLANNING: A STEP-BY-STEP GUIDE</i> | 43 |
| H. Amos Goodall Jr. <i>Partner, Goodall & Yurchak PC</i> <i>MEETING THE ELDER CLIENT'S GOALS THROUGH PERSONALIZED ESTATE PLANNING</i> | 59 |
| R. Thomas Murphy <i>President, R. Thomas Murphy & Associates PC</i> <i>SERVING THE AGING CLIENT: BEST PRACTICES FOR ESTATE PLANNING</i> | 71 |
| Craig A. Hatch <i>Shareholder, Gates, Halbruner & Hatch PC</i> <i>UNDERSTANDING CLIENTS' OBJECTIVES TO ACHIEVE THE BEST POSSIBLE RESULT</i> | 85 |

| | |
|--|------------|
| Shirley Berger Whitenack | 97 |
| <i>Partner, Schenck, Price, Smith & King LLP</i> | |
| <i>PUTTING THE CLIENT FIRST IN ELDER LAW</i> | |
| Shirley A. Kaigler | 113 |
| <i>Partner, Jaffe Raitt Heuer & Weiss PC</i> | |
| <i>WORKING WITH THE ELDERLY CLIENT AND THEIR FAMILY IN ESTATE PLANNING</i> | |
| Appendices | 131 |

Appendices

| | |
|---|-----|
| Appendix A: Durable Power of Attorney for Health Care and Living Will | 132 |
| Appendix B: Biographical Intake Information | 142 |
| Appendix C: Estate and Elder Law Planning Questionnaire | 152 |
| Appendix D: Prospective New Client Letter | 164 |
| Appendix E: Client Information Sheet (Single) | 165 |
| Appendix F: Client Information Sheet (Married Couple) | 172 |