

MONTANA

**LEGAL LIFE DOCUMENTS FOR
HELPING AN AGING PARENT**

PACKAGE

Control Number: MT-P017-PKG



U.S. Legal Forms™ thanks you for your purchase of a Personal Planning Package. This package is an important tool for use in helping your aging parent organize their legal affairs as they begin to enter a later stage of life. It contains key legal documents that are vital for your aging parent to maintain on file and safeguard in the event of an emergency or unforeseen life event.

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I. FORM LIST

With your Documents for Helping an Aging Parent package, you will find state-specific and multi-state forms that will help you in preparing your aging parent for and protecting your aging parent from events that may affect their health, finances and affairs after their death.

Included in your package are the following forms:

- 1. Last Will and Testament that suits your parent's specific needs
- 2. Advance Health Care Directive(s)
- 3. General Power of Attorney effective immediately
- 4. Estate Planning Questionnaire and Worksheet
- 5. Financial Statement for an Individual
- 6. Personal Property Inventory sheet
- 7. Personal Planning Information and Document Inventory
- 8. Worksheets Agreement for Home Health Care by a Nursing Service

II. DESCRIPTIONS OF FORMS

Brief descriptions of the forms contained in your U.S. Legal Forms™ Personal Planning Package are found below.

Last Will and Testament – This form details in writing your parent's wishes regarding who is to receive their property at death and who will administer their estate. It also enables your parent to appoint trustees or guardians, if applicable.

Advance Health Care Directive(s) - The term "health care directive" refers to documents such as a Living Will and a Durable Healthcare Power of Attorney, which enable your parent to exercise his or her legal right to accept or refuse life-sustaining procedures as well as other medical treatments. Other names used in various states for these documents include Medical Directive, Directive to Physicians, Declaration Regarding Health Care, Designation of Health Care Surrogate or Patient Advocate Designation.

General Power of Attorney – This form allows your parent to give a particular person (the agent) the power to manage your parent's assets and financial affairs while your parent is alive. Your parent (the principal) must sign this document while he or she has the required legal capacity to give his or her agent clear and concise instructions. The appointment may be for a fixed period, and your parent can revoke such appointment at any time providing he or she still has the legal capacity to do so. A power of attorney ceases when your parent dies. The executor named in your parent's will then takes over the responsibilities of your parent's estate.

Estate Planning Questionnaire and Worksheet – This form is used to assist attorneys, estate planners, and other professionals with details regarding your parent's home and other property he or she owns and additional assets including investments, life insurance policies, individual retirement accounts and so forth so that they can best recommend a course of action regarding your parent's estate.

Financial Statement for an Individual – This form, a statement of an individual's assets and liabilities, is used to account for your parent's current financial status. It contains sections that request identification of the following: current assets, current liabilities, deferred assets, and net worth.

Personal Property Inventory – This form is used to keep accurate records of your parent's possessions. It provides a central place for an individual or family to itemize all the personal property that is owned and kept in a home. This form is beneficial for keeping accurate records for insurance companies or estate planners.

Personal Planning Information and Document Inventory Worksheets – This form is used to retain important information on file relevant to your parent's life such as names of relatives, their contact information, your parent's medical information, financial asset inventory, the location of your parent's important legal documents and more.

Agreement for Home Health Care by a Nursing Service – This form is used by your parent to enter into an agreement with a nursing service if your parent is ill, elderly or disabled. Your parent must be competent to sign such an agreement. In this agreement, your parent waives damages for simple negligence of a nursing service, but not gross negligence or misconduct that is intentional or criminal in nature.

III. LEGAL DOCUMENT STORAGE

Once you prepare legal documents and forms in your U.S. Legal Forms™ Personal Planning Package, it is highly recommended that you keep forms together. An optional USLegal Life Documents Organizer – small or large size is available for purchase from www.uslegalforms.com to help store your legal documents.

Legal documents should also be kept in a very secure place such as a bank safe deposit box or personal home safe. You may wish to tell your attorney or a family member about the location of your Legal Life Documents Package in the event you are unable to communicate it to them when needed.

IV. TIPS ON COMPLETING THE FORMS

The form(s) in this packet may contain “form fields” created using Microsoft Word or Adobe Acrobat (“.pdf” format). “Form fields” facilitate completion of the forms using your computer. They do not limit your ability to print the form “in blank” and complete with a typewriter or by hand.

It is also helpful to be able to see the location of the form fields. Go to the View menu, click on Toolbars, and then select Forms. This will open the Forms toolbar. Look for the button on the Forms toolbar that resembles a shaded letter “a”. Click this button and the form fields will be visible.

By clicking on the appropriate form field, you will be able to enter the needed information. In some instances, the form field and the line will disappear after information is entered. In other cases, it will not. The form was created to function in this manner.

V. DISCLAIMER

These materials were developed by U.S. Legal Forms, Inc. based upon statutes and forms for the subject state. All information and Forms are subject to this Disclaimer:

All forms in this package are provided without any warranty, express or implied, as to their legal effect and completeness. Please use at your own risk. If you have a serious legal problem, we suggest that you consult an attorney in your state. U.S. Legal Forms, Inc. does not provide legal advice. The products offered by U.S. Legal Forms (USLF) are not a substitute for the advice of an attorney.

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