

BERWITZ & DiTATA LLP

Attorneys and Counselors at Law

310 Old Country Road Suite 101
Garden City, New York 11530
Telephone (516) 747-3200 • Facsimile (516) 747-3727

Lawrence N. Berwitz

Maureen R. DiTata

How Do I Encourage My Elder Parent or Loved One To Take Necessary Steps?

Often encouraging an elderly parent or loved one to undertake estate planning is a sensitive topic. Many of our clients have described feeling awkward or believing that their motives were in question. Yet learning about our loved ones' legal and financial affairs can help to prevent serious problems later.

Think about the issues you want to talk over in advance. Express your concern in ways that demonstrate your respect. The important topics to include are: whether there is a valid last will and testament that expresses their present wishes, whether the individual has legally appointed another to manage financial affairs and to make health care and medical decisions if he or she becomes incapacitated, whether they have a current listing of assets and valuables - and where these documents might be found.

There are many ways to start the discussion. Sometimes it helps to use a story to make a point. Some clients have asked for advice, like this: "I'm putting my will together, how did you do this?" Some people respond more favorably to a direct and factual discussion. The important message to convey is that none of us knows what the future will hold. While the individual is capable of participating in the planning, solutions are available that will permit them to exercise choice and preserve their control, dignity and independence. Perhaps this article can be used to open the discussion.

Your first attempt may not be successful. Step back and approach the subject at a later date in another way. Major issues are seldom resolved with a single suggestion.