

# ADVANCE LIFE PLANNING



**Planning for end-of-life concerns through preparation of advance directives allows you to choose trusted loved ones to make important health care decisions on your behalf and manage your affairs to avoid complicated guardianship proceedings if you lose the ability to make decisions on your own. Below are some important documents that you can complete to ensure your wishes are met:**

**Health Care Proxy:** allows you to appoint an “agent,” someone you trust i.e., a spouse, partner, family member or close friend, to make healthcare decisions on your behalf. The health care proxy becomes effective when your doctor determines that you have lost the capacity to make these decisions for yourself and also allows you to designate a substitute agent in case the first person is unavailable.

**Living Will:** allows you to state what type of medical treatment you do or do not wish to receive with regard to the withholding or withdrawal of life sustaining treatment should you become unable to make these decisions for yourself i.e., you are in a terminal condition or permanently unconscious and unable to communicate or make decisions.

**Power of Attorney:** allows you to designate a trusted agent(s) to make decisions concerning your legal and financial matters if you are unable to make these decisions. Your designated agent(s) can assist with broad or specific powers that you choose relating to banking transactions, real estate transactions, benefits from governmental program, etc. Without a Power of Attorney, it may be necessary to go to court for guardianship to gain legal authority which can be expensive and lengthy.

**Proper planning with a Last Will and Testament can ensure that your estate assets will be distributed to the people you wish to inherit and not decided by the State. You will be able to choose the person(s) you want to be in charge of managing your estate.**

**Last Will and Testament:** directs how your property, which is not otherwise distributed automatically under the law, is distributed upon death. Wills allow you to control how your assets will pass to your beneficiaries, make specific gifts of assets, set up trusts for minor or disabled beneficiaries, name a guardian for your children, and choose the fiduciaries who will manage your estate including executor(s) and trustee(s).

**If you do not have a will,** the laws of your state of residence at the time of death will direct the distribution of your assets. Important people in your life who would not inherit include unmarried life partners, friends, relatives not next in line on the state’s priority list, pets, organizations and institutions, and business partners. Those first on the state’s priority list inherit everything – its an all or nothing approach.



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