



# TULLY LAW GROUP

ELDER CARE AND ESTATE PLANNING

HONOR & PROTECT

## What to expect during your initial meeting...

As attorneys, we chose to focus on Elder Law, Estate Planning and Life Care Planning. We are passionate about helping families face all of the inevitable challenges created by wanting to age in place with dignity, plan their estates, long term care and navigating through Medicaid applications and any other end of life issue.

We want to accomplish several things during your meeting with us:

- Learn more about you and your family.
- Understand your concerns and specific needs (paying for long term care, planning for your family's specific needs such as a minor child or protecting the family home)
- Help you achieve your goals, perhaps asset protection, probate avoidance or Medicaid benefits, etc.
- Support and guide you if a loved one has passed.
- Determine the next best course of action for your Elder Law, Estate Planning and Life Care Planning.

45 years of experience has taught us that getting to know you is our first priority. The questions we ask are specifically designed to help us determine how your needs can be met according to the law and our legal and long term health care systems. The more you share the easier it is for us to understand your personal needs. It can be very helpful if you take the time to complete the Confidential Planning Information as best as you can and write down your questions or concerns prior to our meeting. We want to make sure we cover all the things that are important to you.

At Tully Law Group, we help our clients protect assets and income, draft and implement estate plans and complete lengthy Medicaid applications every day. Please tell us if there are care issues and you will then have the opportunity to speak with one of our elder care coordinators who will work to be your personal advocate. Clients have told me they would be lost without their help with the stress and emotional roller coaster associated with caring for seniors. I want our care advocates to learn as much as possible about what the emotional and health needs really are.

At the end of our conversation, and when all of your questions have been answered, we will determine one of the following outcomes:

- We agree that we are not the right law firm for the legal work you need done and we will be glad to refer you to someone who can help.
- There may be other people we need to include in a second conversation before the appropriate decision can be made.
- We are the right firm for you and you feel comfortable to sign an engagement agreement and start the process.

We all look forward to meeting you.