

# Navigating the Legal Documents You May Need

Presented by Michelle C.  
Berk, Esquire

A stylized silhouette of a mountain range in a darker shade of teal, located at the bottom right of the slide.

# THE LAW OFFICES OF MICHELLE C. BERK, P. C.

400 MARYLAND DRIVE  
SUITE 200

FORT WASHINGTON, PA 19034

(215) 793-4800

FAX (215) 793-4801

[WWW.BERKESQ.COM](http://WWW.BERKESQ.COM)

*ELDER LAW AND GENERAL PRACTICE  
FOR THE PAST 28 YEARS*

# Durable Power of Attorney

- ◆ Financial
- ◆ Healthcare
- ◆ Living Will

# Financial

## Principal & Agent

I, ABC, hereby appoint my wife, XYZ, Agent for me and on my behalf and hereby state that this power of attorney shall not be affected by my subsequent disability or incapacity

## HIPPA Release Authority

## Alternate Contingent

Upon death, resignation or inability of wife, XXX, to serve as my true and lawful Agent, she shall be succeeded by my daughter, XXXX

# Healthcare

## Instructions

My health care agent has all of the following powers subject to the health care treatment instructions that follow:

## Appointment of Health Care Agent

## Alternative Health Care Agent

## Guidance for Health Care Agent Goals

If I have an end-stage medical condition or other extreme irreversible medical condition, my goals in making medical decisions are as follows:

# Living Will

Medical Condition or Permanent Unconsciousness (Living Will)

End-Stage Medical Condition

If I have an end-stage medical condition (which will result in my death, despite the introduction or continuation of medical treatment) or am permanently unconscious such as an irreversible coma or an irreversible vegetative state & there is no realistic hope of significant recovery, all of the following apply:

# Last Will and Testament

Payment of Debts & Funeral Expenses

Burial or Cremation

Personal Property

Specific Bequests

# Last Will and Testament (cont'd)

Residuary

Beneficiaries

In the event my daughter, XXX, fails to survive me, I leave her share in equal shares to her children, XXX,XXX and XXX, who so survive her. In the event any of my grandchildren XXX, XXX or XXX, fails to so survive me, I leave their share in equal shares to their descendants per stripes



# Long Term Care Partnership Policies

What is a Long-Term Care Partnership Policy?

How does a Partnership Policy differ from other long-term care insurance policies?

What will it cover and how does it work?

Are these policies now available for sale in Pennsylvania?

# Long Term Care Partnership Policies (cont'd)

Are income levels or personal assets a factor?

Can I claim a portion of the premium I pay as tax deduction, if I purchase a Partnership Policy?

# Thank You for attending !!

Questions

Comments

Michelle C. Berk, Esquire

