



It's a good time to review estate planning documents

By Ellen Waldman

January 5, 2022

Each year, approximately 40,000 Californians move to Oregon, and in return, about 20,000 Oregonians move out of state. If you're one of the people who've moved to this state, and have not had your basic estate planning documents reviewed by an Oregon attorney, you might want to do that. In fact, the beginning of the year is the perfect time to have them reviewed, even if you have lived here for a long time. Anything that needs to be updated, but hasn't been, can cause a delay in both financial issues and medical care.

In case you're not sure what comprises an estate plan, it generally means you have a will and/or a trust, a durable power of attorney, and an Oregon advance directive. In fact, a newer version of the advance directive was created last year. You don't need to update this form if nothing has changed with either your wishes or your representatives. But you might want to take a look at it anyway, since it's added quite a bit more room for detailing your choices. Here's the link:

<https://www.oregon.gov/oha/PH/ABOUT/Pages/ADAC-Forms.aspx>

It's also perfect timing to get some excellent help on these and other topics by attending a 3-session Vital Issues Forum offered by OLLI at SOU. Entitled, "Plan4Care: Values and Choices", these presentations help with planning for and navigating choices as "aging happens". This series, co-sponsored by Asante, Rogue Valley Manor, and AARP is free and available on Zoom. The dates are Jan 23, Jan 30 and Feb 6, 2:00-3:30, and each presentation will have three expert panelists. The moderator is Heather M. Young, PhD, RN, gerontological nursing expert and professor at UC Davis. Register to receive the Zoom link at: olli@sou.edu or 541-552-6048.

The topics at the sessions include anticipating care needs and considering personal values; developing and communicating an action plan; and identifying resources for developing a care plan. This whole area can be overwhelming and complex. Having this information and navigation offered by these professionals is a much-needed gift to our community. In over 20 years in this field, I have rarely met anyone who didn't need help and guidance for planning these areas of their life.

Back to the estate planning documents. Recently, I spoke with a couple where the husband had been diagnosed with dementia. It was obvious that at some point, he will no longer be able to serve as his wife's power of attorney or health care representative on the advance directive. Understanding this, they reached out to their daughters for assistance in preparing for their future needs. Another person had created an advance directive that no longer reflected her wishes, since she recently received a diagnosis of a terminal disease. If anything like these scenarios have occurred in your life, please make sure your important documents reflect this new status.

On a lighter note, please consider if you really need all those catalogs that you receive in the mail. If something were to happen to you, calling each one and having them cancelled is a bigger task than you might think. I recently took this on for a client, and no exaggeration, over several months I called 66 companies, some of them multiple times. One catalog sells your name to another one, and off this goes.

So, tidy up what you can, make changes where they're needed, and start this new year off a lot lighter in the heart.