

Collier Legal Company

Ashlie M. Collier

Attorney at Law

Meet Ashlie:

Born and raised in a small farm town in Northern Indiana, I have a heart for helping the communities in which I grew up. After graduating law school at Notre Dame, I opened a small firm in Nappanee. I believe legal services should be accessible to everyone. Every element of what I do reflects this attitude. That's why fees are transparent and the array of estate planning and elder law services I offer are designed with your best interest in mind. I believe that by equipping my clients with information, they can feel confident in their estate planning decisions.

Contact Ashlie:

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Estate Planning:

To Assure that all of your wishes are known in life and carried out upon your death. Take control of your estate and ease the burden on your family to not have to make decisions on your behalf.

Traditional estate planning documents include wills, trusts, the appointment of a General Durable Power of Attorney, the appointment of a Healthcare Power of Attorney/ Healthcare Representative, and advanced directives. It may also include planning such as; property transfers, funeral planning, and supplying HIPAA waivers to medical facilities.

Elder Law:

An Elder Law attorney focuses their practice with special consideration to the key issues and legal needs seniors face; housing, financial well-being, health, long-term care, and autonomy/quality of life. Legal issues concerning special needs clients also fall under the practice of Elder Law.

Estate Administration:

Upon your death, your estate needs to be collected and managed. Estate administration involves gathering estate assets, paying debts, and making distributions to heirs and beneficiaries. During the estate administration process (also known as probate) an attorney assists your appointed Personal Representative in seeing that your last wishes are carried out.

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Essential Planning Documents

...and a few suggestions to accomplish your donative intent.

Presented by:

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Five Essential Documents:

- Will
 - General Durable Power of Attorney
 - Healthcare Power of Attorney
 - Living Will
 - HIPAA Release
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The Ones that Concern Healthcare:

- **Healthcare Power of Attorney:**
 - A Healthcare Power of Attorney is going to allow your nominated attorney-in-fact to make healthcare decision for you if you are incapacitated.
 - Once you regain capacity, the power is no longer available.
 - What “type” of person should this be?

- **Living Will:**

- Answers the very limited question of whether you wish to receive artificial nutrition and hydration if:

- (1) You have an incurable injury, disease, or illness;
- (2) Your death will occur within a short period of time; and
- (3) The use of life-prolonging procedures would serve only to artificially prolong the dying process

- **HIPAA:**

- Who would you like to have access to your protected health information?

- **Talk to your doctor about:**

- POST (Physicians Order for Scope of Treatment)
 - Can only be filled out if death is reasonably eminent within 12 months
 - Addresses:
 - CPR
 - Medical Interventions
 - Antibiotics
 - Artificial Nutrition
 - And other optional orders
 - DNR (Do Not Resuscitate)
 - Out of Hospital DNR

General Durable Power of Attorney:

- A General Durable Power of Attorney is going to allow your nominated attorney-in-fact to deal with your finances in some way or another.
 - It can take effect immediately or be “springing.”
 - Can be expanded or limited to very specific scenarios.
 - A Power of Attorney extinguishes when you do.
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Last Will and Testament:

- Probate is the process of retitling things from the decedent’s name to the beneficiaries’ names.
 - Probateable assets are things without named beneficiaries.
 - Your Last Will and Testament will be reviewed to tell the courts who your beneficiaries are and who you’d like to assist the courts in overseeing estate administration.
 - Is subject to creditors.
 - If it’s not a probateable asset, your Last Will and Testament will not be responsible for distributing it.
 - How do we “avoid probate?”
 - Move it from the probateable asset bucket to the non-probateable asset bucket.
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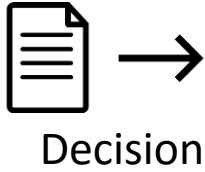
Trusts:

- Inter Vivos or Testamentary
 - Revocable or Irrevocable
 - Why have a trust?
 - You need or want to control money after your death.
 - Once we distribute something under a Last Will and Testament it's gone. A Trust can control for generations to come and limit the types of expenditures your money can be used on.
 - Can be a mechanism to avoid probate.
 - There are reasons why a trust may not be the best option.
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Gifts through your estate:

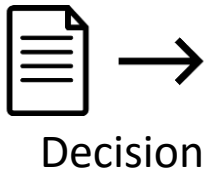
- Inside Estate Planning Documents your Attorney will draft:
 - Specific Bequest under your Last Will and Testament
 - Naming a charity as a named beneficiary in your Trust
 - Outside an estate planning document your attorney will draft:
 - Making a charity the beneficiary of your IRA either through an RMD or benefit after death
 - Changing the owner of a life insurance policy or the named beneficiary of a life insurance policy.
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Essential Planning Documents



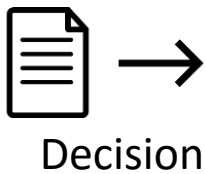
General Durable
Power of Attorney

Appoints an Attorney-in-Fact to help manage finances.



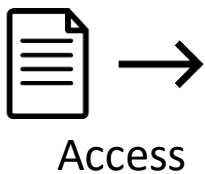
Healthcare
Power of Attorney

Appoints a Health Care Attorney-in-Fact to help make medical decisions if incapacitated.



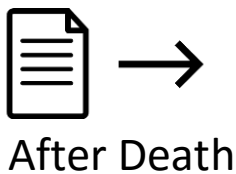
Advanced Directive

Designates whether you would like to receive artificial nutrition and hydration to sustain life.



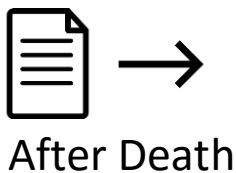
HIPAA Release

Allows designated individuals the ability to access medical information.



Will

Is considered in the Probate process to assist in winding up financial affairs and distribution to beneficiaries.



Trust

Is considered outside the probate process and provides distribution to beneficiaries.