



What you need to know about  
**Elder Law**

Rather than working in just one area of law, elder law attorneys focus on all of the legal needs of their elderly clients and their families. The Schofield Law Group handles general estate planning issues and counsels clients about planning for incapacity and possible long-term care needs. We also counsel clients about suspected financial and physical elder abuse.

**Please prepare the following information** prior to meeting with the Schofield Law Group. (Attach additional sheets if necessary.)

1. Your name and contact information. ↓

---

2. The name of the elder, you are concerned about, and your relationship with that elder. ↓

---

3. The names and addresses of any immediate family members and anyone who might have knowledge or interest in the situation (friends, neighbors, doctors). ↓

---

4. The types of legal help you are interested in, for example:

- Potential financial elder abuse
- Potential physical elder abuse
- Medicaid/MediCal, planning, social security and retirement benefits
- Estate Planning (please refer to the Estate Planning Fact Sheet)
- Advanced Directives
- Planning for incapacity
- Conservatorships (please refer to the Conservatorship Fact Sheet)
- Probate (please refer to the Probate Fact Sheet)

**Please be prepared to bring with you all of the relevant documents you can find.**

For example:

- prior wills or trusts or powers of attorney
- any bank statements, property deeds, medical records, income and benefits statements, etc.

Bring what documents you have; don't put off setting up an appointment because you are missing a few important documents.

5. Please provide a brief statement about the nature of your legal situation, including the important dates, people and places. Sometimes it is easier to provide this information in the form of a timeline or a chart. ↓

---

**A S C H O F I E L D L A W G R O U P F A C T S H E E T**