ELDER-LAW CONSULTATION / 01

DEFINE THE CONSULTATION OBJECTIVE

Use neutral labels only. Keep family, health, benefit and financial details in a private channel chosen with counsel.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Objective A / broad planning or coordination goal / no facts

Older Adult A / neutral label only / no identifying details

Support Person A / broad role question / authority unresolved

Decision Role A / current, proposed or unknown

Document Category A / private inventory label / no contents

Urgent or safety concern / contact proper professional directly

Preparation only. Not legal, health, caregiving, benefits, tax, financial, filing, document, deadline or outcome advice. No attorney-client relationship. Keep identities, family facts, health details, finances and private records out.

ELDER-LAW CONSULTATION / 02

MAP QUESTIONS AND PRIVATE HANDOFFS

Separate legal review, community-service navigation, financial-caregiving questions and follow-through ownership.

Legal Question A / private review owner / no conclusion

Aging-Service Question A / current source route / no search result

Financial-Caregiving Question A / role label / authority unresolved

Private Record Category A / secure handoff method to confirm

Other Professional A / proposed coordination role / not selected

Follow-Through Step A / owner / confirmation method

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ELDER-LAW CONSULTATION / 03

CHECK THE NON-SENSITIVE CONSULTATION PACKET

Tick what is organized. These checks do not create authority, decide capacity or provide legal advice.

- [ ] One broad objective is stated without a legal conclusion
- [ ] People and roles use neutral labels
- [ ] No health, benefit, financial or family details are recorded
- [ ] Document categories are listed without contents
- [ ] Legal and non-legal service questions are separated
- [ ] Decision authority remains unresolved until qualified review
- [ ] Private handoff and follow-through owners are identified
- [ ] Written scope, complete fees and exclusions will be compared

Private legal question still open / attorney response needed

Service or financial-caregiving question still open / source owner

Follow-through or document-handoff question still open / owner

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ELDER-LAW CONSULTATION / 04

QUESTIONS FOR AN ELDER-LAW ATTORNEY

Ask every attorney the same objective, role, coordination, privacy and engagement questions.

Fit: which elder-law objectives and matter types fit your practice?

Private review: which questions should be discussed first?

Roles: how will decision and support-person questions be handled?

Records: which categories are needed and how are they shared securely?

Coordination: how do you work with services and other professionals?

Engagement: what work, follow-through, fees and exclusions are written?

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ELDER-LAW CONSULTATION / 05

COMPARE THE SAME CONSULTATION BRIEF

Use Attorneys A and B with the same neutral objective. Keep private facts in confidential consultations.

Attorneys A / B / consultation references / no private facts

Relevant experience, initial review and role explanation - A / B

Deliverables, coordination, communication and follow-through - A / B

Complete fees, exclusions, private handoff and fit - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start an Elder Law Attorney request. Share only a non-sensitive consultation objective and neutral role-question brief so participating attorneys can compete with proposals. Compare relevant experience, written scope, complete fees, communication, coordination and fit. A private consultation and conflicts check may be needed before engagement.

One request. Every pro's best offer.

Start a request

Participation varies. A planning conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/attorney-elder-law

HHS Administration for Community Living: Eldercare Locator (official reference)

Consumer Financial Protection Bureau: Managing Someone Else's Money (official reference)

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