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Caring for Aging Parents:

A Guide to Legal & Estate Planning Support



Overview



Caring for aging parents is a meaningful but often complex responsibility that involves much more than medical appointments and ensuring their safety at home. It's about protecting their wishes, preserving their assets, and preparing for the future with thoughtful planning.

This guide is designed to help adult children navigate these important steps while highlighting how working with an experienced estate planning attorney can provide invaluable support at every stage.

Review Living Arrangements & Plan for Future Care



Exploring Options to Ensure Well-Being

- Assess your parents' current living situation for safety, comfort, and accessibility.
- Discuss potential long-term care options, such as assisted living, in-home care, or memory care facilities.
- Work with an attorney to prepare or update key legal documents that reflect your parents' healthcare preferences, including advance directives, HIPAA releases, and living wills.



Organize Essential Legal Documents

└ Gather and Secure All Critical Legal Paperwork

- Confirm that wills, trusts, powers of attorney, and healthcare proxies are current, valid, and reflect your parents' wishes.
- Ensure the right people are designated to make medical and financial decisions if your parents become incapacitated.
- Collaborate with an estate planning attorney to ensure all documents comply with Oklahoma law and are tailored to your family's unique needs.



Coordinate Healthcare Decisions with Legal Support



Keep Information Current and Clear

- Maintain up-to-date medical records and keep a current list of healthcare providers and emergency contacts.
- Make sure healthcare proxies and advance directives are easily accessible to those responsible for care.
- Develop a comprehensive healthcare plan with legal safeguards that respect your parents' wishes and provide clear authority to decision-makers.



Secure Financial Stability and Protect Assets



Protect Your Loved One's Financial Future with Confidence

- Review all income sources, insurance policies, and projected long-term care expenses.
- Explore options such as irrevocable trusts or Medicaid planning to protect assets from unnecessary depletion.
- Consult with an attorney to minimize tax burdens, avoid probate, and safeguard against financial abuse or exploitation.



Prepare for Emergencies and End-of-Life Wishes



Peace of Mind Starts with Preparation

- Document all emergency contacts, plans, and instructions in a clear, accessible format.
- Have open discussions about funeral preferences, memorial services, and other end-of-life arrangements.
- Work with an attorney to incorporate these wishes into estate plans or letters of instruction to ease decision-making during difficult times.



Start the Conversation Early & Keep it Ongoing



Open the Door to Ongoing Conversations About Aging and Legacy

- Initiate honest, respectful discussions about aging, independence, and legacy as early as possible.
- Continue the conversation regularly to address changing circumstances and new concerns.
- Partner with an estate planning attorney to create a personalized plan that reflects your parents' values and goals, ensuring peace of mind for the entire family.



Ready to take the first step?



At Ball Morse Lowe, we know that caring for aging parents requires more than just legal documents — it requires compassion, clarity, and thoughtful planning.

We are here to guide Oklahoma families through every step of the estate planning process with personalized strategies that protect what matters most.