

The Law Office of  
**Brown & Brown, P.C.**

*Estate, Trust, Tax and  
Long Term Care Planning*



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**Baird B. Brown**

**Clara Brown Shaffer**

**Shauna C. Clemmer**

**Daniel F. Fitzgerald**

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**"Accumulating wealth is one thing. Preserving it is another.  
Let our family help yours."**

## *Special Report*

### Prepare Your Bucket List

Jack Nicholson and Morgan Freeman made this phrase famous a few years ago as characters in a movie chronicling the adventures of two older men after they were both diagnosed with terminal illness. As we age, it is important to have goals and dreams and try our very best to accomplish them.

And just as important as a bucket list of experiences is the bucket list of things you need to do to help your loved ones as you age. This list, while not as glamorous is just as important.

1. Make a list of all of your assets.
2. Review your estate plan to make sure it expresses your wishes.
3. Give copies of your advance directives to the agents you have named.
4. Make a list of your financial and legal advisers and their contact information.
5. Tell someone where your original estate planning documents are. If you keep them in a safe tell someone where they can find the code or key for that safe.
6. Think about your options for long-term care planning and make sure you have a plan to pay for your long -term care either through insurance, private pay or governmental benefits.
7. Identify what personal property items you want to give to certain individuals and make a list.
8. Prepay for your funeral or cremation.
9. Talk to your family about your end-of-life wishes. This will make sure you receive the type of care you want, and it will alleviate the burden of making those decisions from your family.
10. Write about the experiences you have been through to preserve your life history for your family.