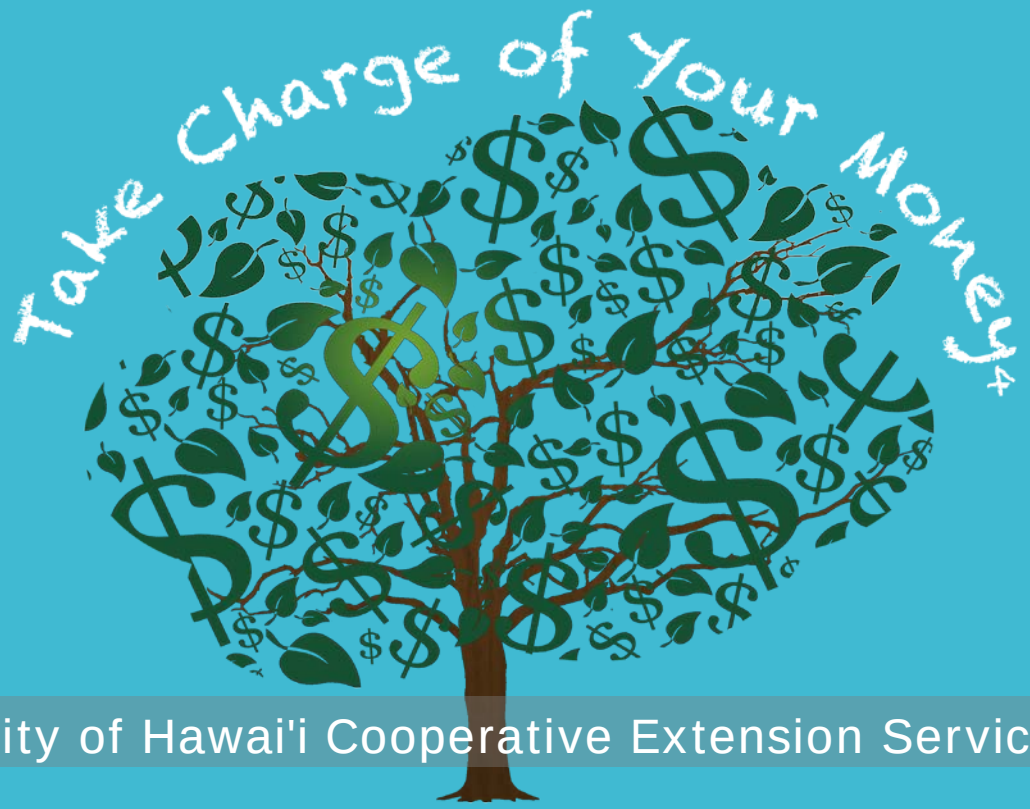

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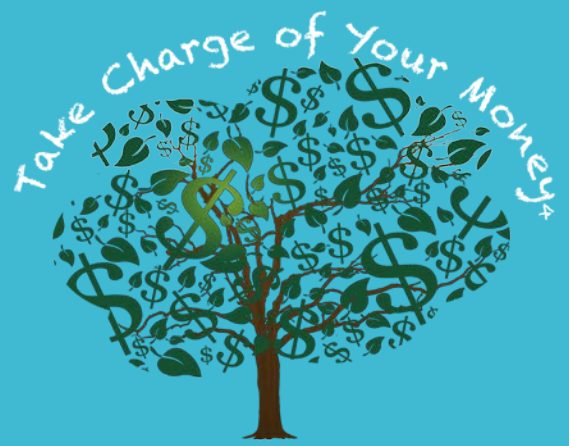
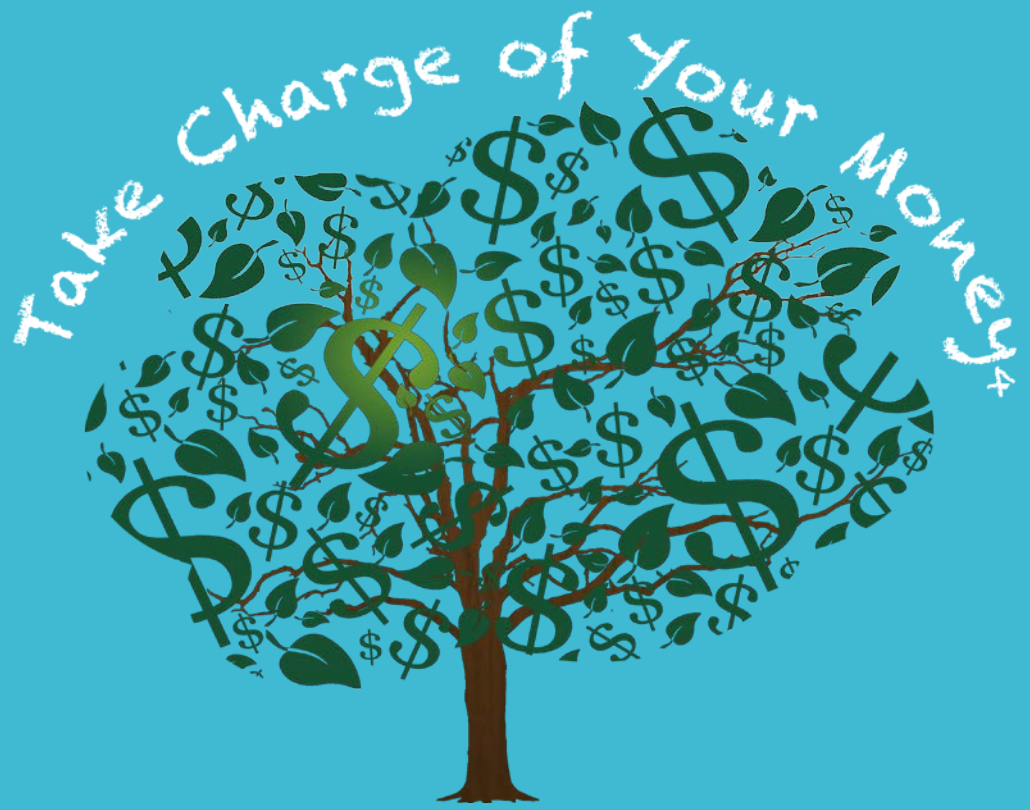
Course Objectives



- Increase your knowledge about financial planning
- Improve your ability to make informed decisions



Incapacity Planning

Presenter

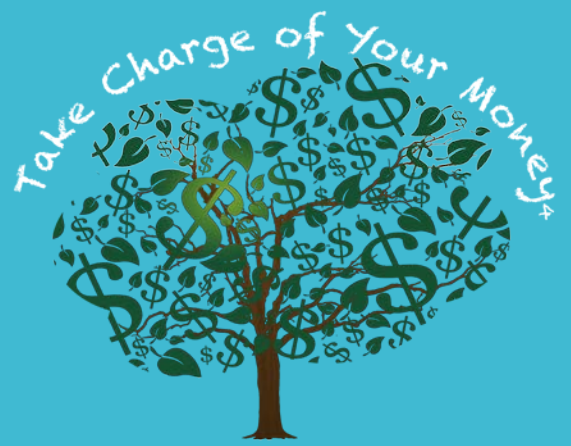
Goodsill Anderson Quinn & Stifel

A Limited Liability Law Partnership

Judy Yuriko Lee,

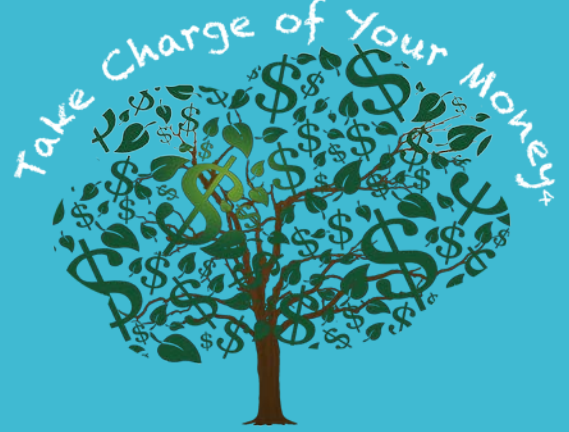
Esq., CFP®, Partner

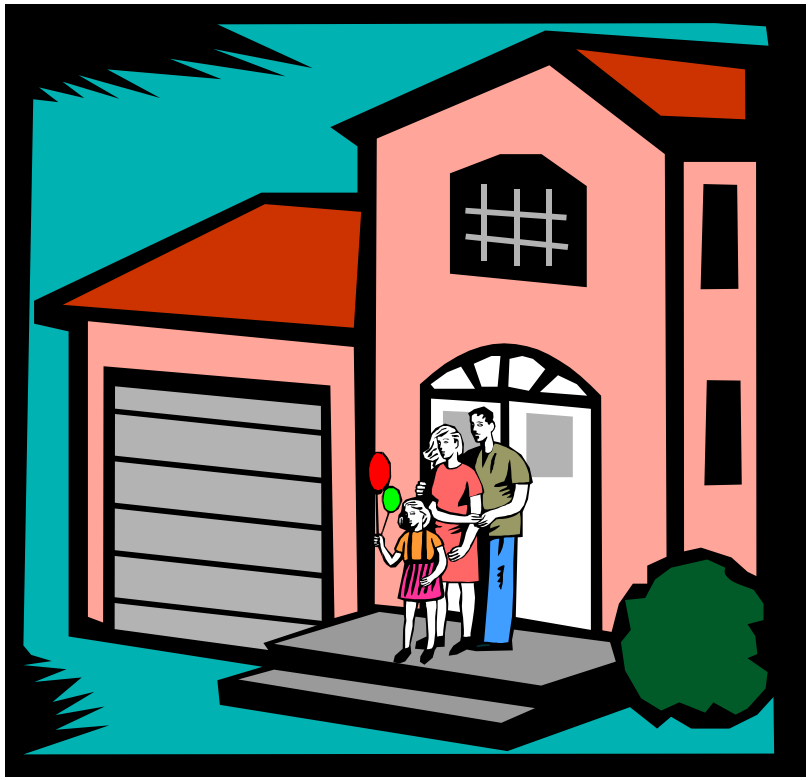
Lesson Objectives



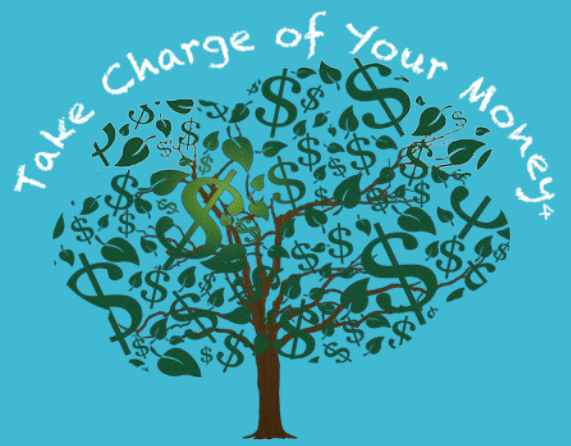
- Identify the purpose and need for proper estate planning
- Gain awareness of documents for incapacity planning

Incapacity Planning





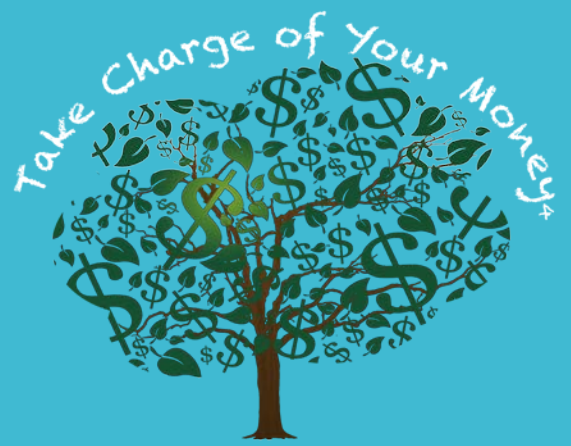
Society is Changing



Demographics

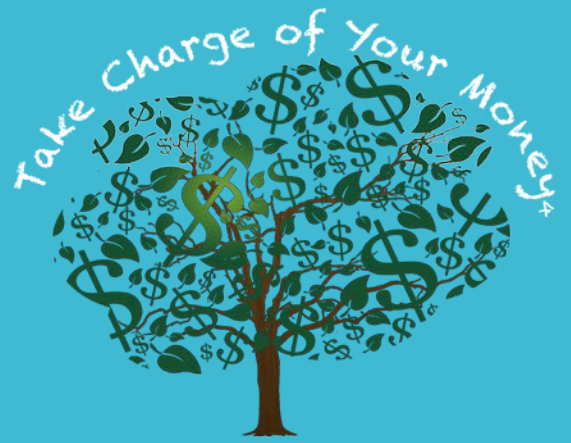
- Large elderly population needing assistance in living and managing finances
- Younger family members living outside of state

Two Areas of Concern



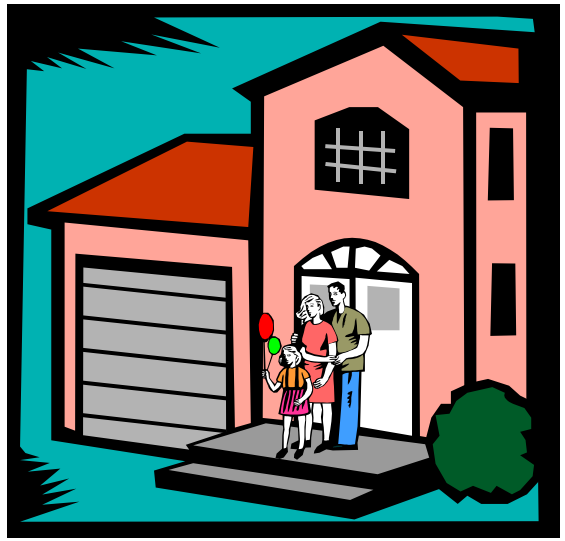
- Decision-making for the property and finances
- Decision-making over one's person and medical care

Avoid Need For

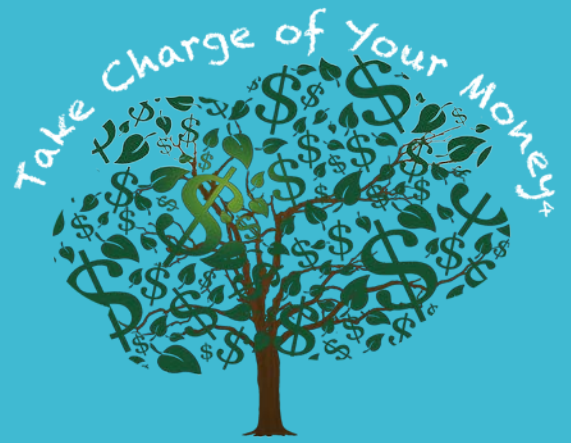


Court-Supervised Proceedings

- Conservatorship of the property
- Guardianship of the person

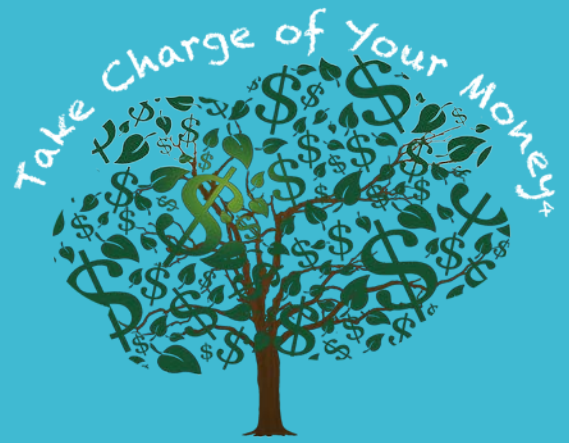


Execution of Special Documents



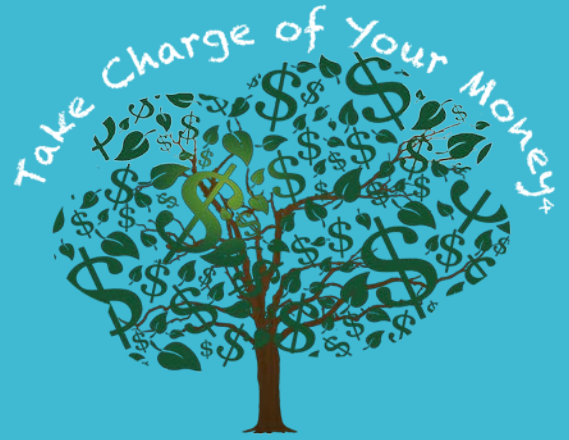
- Revocable Living Trust
- Power of Attorney

Advanced Health Care Directive

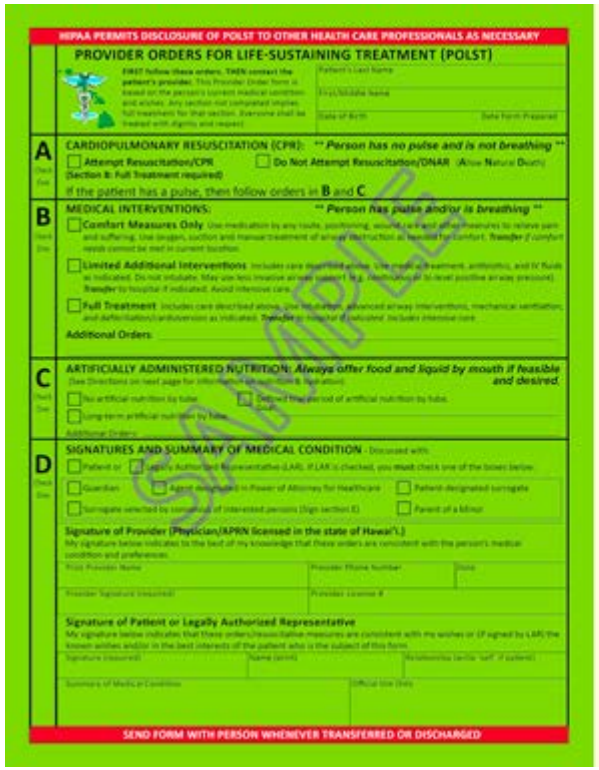


- Health Care Power of Attorney
- Living Will

POLST



Provider Order for Life Sustaining Treatment


HIPAA PERMITS DISCLOSURE OF POLST TO OTHER HEALTH CARE PROFESSIONALS AS NECESSARY

PROVIDER ORDERS FOR LIFE-SUSTAINING TREATMENT (POLST)

A CARDIOPULMONARY RESUSCITATION (CPR): ** Person has no pulse and is not breathing **

Attempt Resuscitation/CPR | Do Not Attempt Resuscitation/DNAR (Allow Natural Death)

(Section B: Full Treatment required)

If the patient has a pulse, then follow orders in B and C

B MEDICAL INTERVENTIONS: ** Person has pulse and/or is breathing **

Comfort Measures Only

Limited Additional Interventions

Full Treatment

Additional Orders:

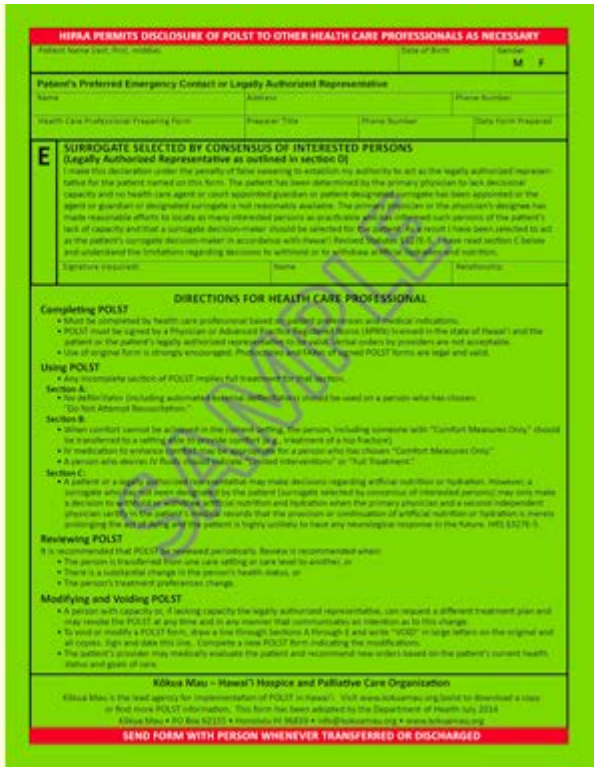
C ARTIFICIALLY ADMINISTERED NUTRITION: Always offer food and liquid by mouth if feasible and desired.

D SIGNATURES AND SUMMARY OF MEDICAL CONDITION

Signature of Provider (Physician/APRN licensed in the state of Hawai'i.)

Signature of Patient or Legally Authorized Representative

SEND FORM WITH PERSON WHENEVER TRANSFERRED OR DISCHARGED


HIPAA PERMITS DISCLOSURE OF POLST TO OTHER HEALTH CARE PROFESSIONALS AS NECESSARY

Patient's Preferred Emergency Contact or Legally Authorized Representative

E SURROGATE SELECTED BY CONSENSUS OF INTERESTED PERSONS (Legally Authorized Representative as outlined in section D)

DIRECTIONS FOR HEALTH CARE PROFESSIONAL

Completing POLST

Using POLST

Section A:

Section B:

Section C:

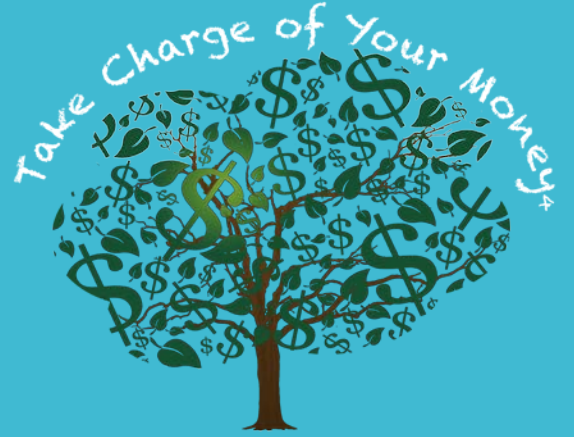
Reviewing POLST

Modifying and Voiding POLST

Kōkua Mau – Hawai'i Hospice and Palliative Care Organization

SEND FORM WITH PERSON WHENEVER TRANSFERRED OR DISCHARGED

Website & TV Channels



Take Charge of Your Money$_4$

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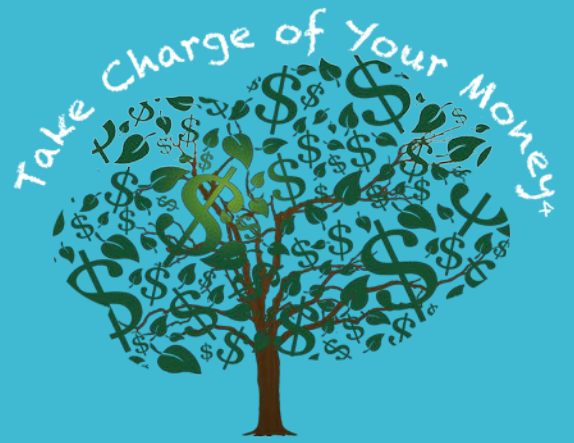
- TV channels
  - 354
  - 355

Credits



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- University of Hawai‘i at Mānoa
  - College of Tropical Agriculture & Human Resources, Cooperative Extension Service, Department of Family & Consumer Sciences
  - Information Technology Services-Academic Technologies
- Judy Yuriko Lee, Esq., CFP®, Partner

  Goodsill Anderson Quinn & Stifel
  A Limited Liability Law Partnership LLP

Mahalo Special Guests

Actors & Actresses in Skits

- Susan Pang as Mrs. Kai
- Travis Agustin as Kimo
- Judy Lee as Estate Attorney