Take Charge of Your Money

A University of Hawai'i Cooperative Extension Service Project

www.ctahr.hawaii.edu/tcym
Course Objectives

- Increase your knowledge about financial planning
- Improve your ability to make informed decisions
Incapacity Planning
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
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
- Health Care Power of Attorney
- Living Will
Provider Order for Life Sustaining Treatment
Take Charge of Your Money

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We would like to thank the following for their support:

- 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
  Goodisll 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