



CURATED FOR
SENIORS
Edited for life's finest chapter

FREE PRINTABLE GUIDE

Elder-Law Consultation Preparation Guide

What to organize before a short consultation

Introduction. An elder-law consultation is often brief and focused. Families get more from it when they bring a clear account of the situation and distinguish urgent questions from longer-term planning.

How to use this guide. Write down facts and deadlines before the appointment. Let the attorney decide which legal documents, rules, or options apply.

Free and non-commercial. Prepared by George at Curated for Seniors. Not approved or endorsed by any organization.

Gather the situation

A few practical points to keep in mind.

- ☐ Write a short timeline of the issue.
- ☐ List the people and organizations involved.
- ☐ Mark any notice, deadline, court date, or urgent decision.
- ☐ Separate facts from assumptions or family disagreements.

Organize documents

A few practical points to keep in mind.

- ☐ Collect only the documents the attorney asks you to bring.
- ☐ Keep originals secure and bring copies when requested.
- ☐ Write down the questions that matter most.
- ☐ Do not sign a legal document simply because it is included in a packet.

Use the consultation well

A few practical points to keep in mind.

- ☐ Start with the most urgent issue.
- ☐ Ask what decisions can wait.
- ☐ Record the recommended next step and deadline.
- ☐ Confirm how to contact the attorney with follow-up questions.

What to do next

Choose one next step you can complete this week. A small action is more useful than a perfect plan that never starts. Keep this guide with the notes or contact information needed for the next conversation.

Important note: *This guide is general information, not legal, financial, medical, or estate-planning advice and not a substitute for an attorney. Consult a qualified elder-law attorney for advice about documents, authority, benefits, housing, or family circumstances; verify deadlines and official requirements independently.*

This is general information for preparing a conversation or next step, not individualized professional advice.

Notes and what to buy
