

**Attorney Timothy P. Crawford, CPA, CELA\*, CAP\*\***  
wanted to share this information with you.

## **Tips for Clients and Families**

**GREATER MILWAUKEE AREA OFFICES IN BROOKFIELD, GLENDALE, MILWAUKEE, OAK CREEK & RACINE**

### ***Your Asset Protection Law Firm***

840 Lake Avenue, Suite 200  
Racine, WI 53403  
(262) 634-6659

E-mail: [tpc@execpc.com](mailto:tpc@execpc.com)

Website: [www.TpcLaw.com](http://www.TpcLaw.com)

Following these suggestions can save you and your family loads of time and trouble.

- Name a trusted person as co-owner of your safe deposit box so it can be accessed without your family seeking court authorization. When you pass away, your Durable Power of Attorney is no longer valid; thus, your agent will not have automatic access to your safe deposit box.
- If you hide valuables or cash around the house or stuff them in furniture, tell someone you trust where to find these items, so they are not overlooked or given away. In 2011 a Utah man found \$45,000 in the attic of his new home. He located the prior owner and gave it back, but your family may not be so lucky!
- Alert us when your loved one passes away. It is a painful time, but frequently steps must be taken that are time sensitive, and we can help you with them. *Timothy P. Crawford's clients and family are never alone!*
- If a Wisconsin resident passes away out of state, for example, at a hospice or a hospital out-side Wisconsin, make sure that when you report the death, you provide his/her Wisconsin address.
- Do not hoard! Getting organized is a gift to your family. That said, do not pitch documents you may need in the future, such as those required to apply for Medicaid long-term care benefits. The required list is on our website. Tracking down discarded items can be a world-class frustration.
- Do not name a personal representative, trustee or agent without making sure the person is willing and able to serve. Update as needed. We have seen many cases in which an incapacitated person's agent is deceased or disabled, requiring the courts to get involved.
- Give your health care agent a copy of your health care power of attorney, a list of medications you take and a list of your physicians. Keep them updated.

**“Those Who Plan Ahead Win.  
Those Who Don’t Plan Ahead Lose.”**

This article is for informational purpose only and is not intended as legal advice. It is recommended that you call Timothy P. Crawford for a free conference to discuss your situation in more detail. Attorney Crawford can be reached at 1-262-634-6659. Please refer to this article when you call.

\*Attorney Timothy P. Crawford is a Nationally Board Certified Elder Law Attorney (**CELA**). He has been Board Certified by the National Elder Law Foundation which has been approved as the Sole Certifying Organization for Elder Law Attorneys by the American Bar Association.

\*\*Timothy P. Crawford was invited to join the Council of Advanced Practitioners (**CAP**) of the National Academy of Elder Law Attorneys (**NAELA**) in August of 2005. **CAP** is a small group of premier elder law attorneys, all of whom have been members of NAELA for at least 10 years, are certified as elder law attorneys by the National Elder Law Foundation, and are AV rated by Martindale Hubbell, a service that provides an independent rating of the quality of attorneys, as one of the top attorneys in the nation.

Attorney Timothy P. Crawford has been selected as a **Fellow** of NAELA. **Fellow** is the highest honor bestowed by the Academy. Selection as a **Fellow** signifies that his peers recognize the lawyer as a model for others and as an exceptional lawyer and leader.

Attorney Timothy P. Crawford has a superb rating of 10 out of 10 with A V V O.

A V V O has awarded to Attorney Timothy P. Crawford the A V V O Client’s Choice Award.

**YOUR ASSET PROTECTION LAW FIRM WITH GREATER MILWAUKEE AREA OFFICES IN  
BROOKFIELD, GLENDALE, MILAUKEE, OAK CREEK & RACINE**

**"Helping Families in Wisconsin for Over 40 Years  
to Protect Their Assets from Nursing Home Care Costs"**

“A majority of text has come from an article prepared by Attorney Joseph Karp, friend of Attorney Timothy P. Crawford, is used here with permission.”