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*Your Trusted Planning Advisor Through Life*

***Top Ten Reasons Why The LGBTQ Community Consults  
With Stephanie L. Schneider, Esq. Board Certified Elder Law Attorney***

Estate & Incapacity  
Planning

- ◆ Probate & Trust Administration
- ◆ Last Will & Testament
- ◆ Revocable Trust
- ◆ Durable Power of Attorney
- ◆ Designation of Healthcare Surrogate
- ◆ Quit Claim Deed
- ◆ Living Will

Advocacy Services

- ◆ Guardianship & Guardian Advocate
- ◆ Facility Residents' Rights
- ◆ Medicaid Applications & Appeals
- ◆ Veterans Benefits Counseling

Government Assistance

- ◆ Special Needs Trusts
- ◆ Representation of Trustees
- ◆ Protecting Lawsuit Proceeds & Inheritances to Preserve Medicaid & SSI Eligibility
- ◆ Exceptions to Medicaid Lien Recovery

1. To receive comprehensive legal advice about **new federal rights** for married same-sex couples as a result of the U.S. Supreme Court decision in *Windsor* and *Obergefell* (benefits include: tax, I.R.A. distributions, ERISA, military, and more).
2. To create a management plan designating the partner or, spouse as financial agent under a **Durable Power of Attorney** in the event of incapacity.
3. To ensure that the partner or, spouse has legal authority as the **Designated Healthcare Surrogate** to make medical decisions in the event of incapacity. This maintains privacy and avoids an expensive and time consuming guardianship.
4. To create a legally enforceable estate plan to provide an inheritance for the partner or, spouse (i.e. **Revocable Trust or Last Will & Testament**).
5. To create an effective plan for the couple's children including a **Declaration of Preneed Guardian of a Minor**, a **special needs trust** for children with a disability, and simple documents for a child who is 18 years old.
6. To create a **Declaration of Designee for Funeral Arrangements** so that the partner or, spouse has legal authority to make all funeral related decisions.
7. To create and implement a plan so that the surviving partner or, spouse has a **protected interest in the home** they share.
8. To coordinate arranging for **maximum benefits under employee benefit plans** prior to retirement in order to benefit the partner/spouse and/or children.
9. To guide them on aging issues affecting their **parents and grandparents** such as how to properly fulfill their fiduciary duties under the relative's legal documents.
10. To advise them on aging issues affecting their **parents and grandparents** including, but not limited to, government benefits (Medicaid, VA).

*Proper Planning  
May Create Peace  
of Mind*