

The logo for Anderson Strathern, featuring a stylized 'AS' monogram in red and the company name 'Anderson Strathern' in white serif font.

AS Anderson
Strathern

The background features a dark grey field with large, flowing, organic shapes in a vibrant red color. These shapes create a sense of movement and depth, framing the text.

Power of Attorney and estate planning

Information session

Sarah Lonie
Anderson Strathern

Power of Attorney

- Financial Attorneys
- Welfare Attorneys
- Appointing attorneys
 - Who?
 - How many?
- Using a Power of Attorney
 - When?
 - How?
- Office of the Public Guardian
 - Registration

Guardianship

- Guardians
- Court process
- Doctor reports
- Mental Health Officer report
- Appointment length
- Inventory and Management plan
- Caution

Care home cost planning

- When can the Local Authority assess your finances?
- What do they assess?
 - Income
 - Capital
- What happens when someone is staying in the property?
 - Spouse/civil partner
 - Dependants
 - Others
- Deprivation of Capital
- Planning in your Will
 - Trusts

Trusts for vulnerable beneficiaries

- Planning in Wills
- Why use a Trust?
 - Assessment of benefits
 - Financial inexperience
 - Vulnerable to influence
 - Disabled
- Trust options
 - Liferent
 - Discretionary Trust
 - Disabled Discretionary Trust
 - 1 size doesn't fit all!

Questions

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