HOOK LAW CENTER
NEWS

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"Why a Client Questionnaire?"

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This Weekly Newsletter is brought to you by

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Before your initial consultation with a Hook Law Center attorney, our staff will send you a questionnaire. We will ask that you complete the questionnaire and bring several documents with you to your appointment, like prior estate planning documents and financial statements, so that we may better get to know you and understand your needs.

You may be hesitant to provide us with this information; without a full understanding of how the information will be used, it may seem like we're trying to pry or learn more about you than is necessary. However, whether you've come to us for estate planning, planning for public benefits, estate and trust administration, or financial planning, the information we request on our client questionnaire guides us as we make our legal recommendations and follow through with them for you. The more accurate the information you provide us, the stronger our recommendations will be, leading to a greater outcome for you.

Below are a few examples of information we request from you and how we use that information for your benefit.

1. *Social Security Numbers and Dates of Birth* – We often use this information to complete beneficiary designation forms for retirement accounts, brokerage accounts, and life insurance policies, as well to prepare life insurance claim forms and probate documents, and to apply for public benefits on your behalf. We use this information only when absolutely necessary and take precautions to ensure that any documentation containing this information is shredded when it is no longer needed.

2. *Military Experience and Dates of Service* – You may not realize it, but if you have served in the military, depending on your dates of service, you may be entitled to benefits to help pay for in-home care, assisted living facility or nursing home expenses. If your loved one was a veteran and has recently passed away, you may also be able to apply for assistance with burial and funeral expenses. If you provide us with accurate information relating to your military experience and dates of service, we may identify sources of assistance for you that you did not know existed.

3. *Annual Income and a Summary of Your Assets* – Your income and finances play a large role in helping us determine which options are best for you.

"Why a Client Questionnaire?" – Cont'd

Providing accurate information about these topics will help us determine whether to build estate tax planning or business succession planning into your estate plan, make recommendations about buying long-term care insurance or planning for your retirement, or identify what steps will be required as you complete the probate process. Our recommendations are only as strong as the information you provide us; if you request our assistance in applying for Medicaid, for example, but fail to disclose all of your assets to us at your initial consultation, the chance that we will later need to re-work our plan or push back the date of your application increases dramatically. We want to achieve the best outcome for you, but can only do so with an accurate understanding of your finances.

4. *Contact Information for Your Children* – It is important for us to have this information for the purpose of including it in your Will, Advance Medical Directive, or Power of Attorney; as well as to be able to complete several of the forms mentioned above. We will never contact your children without your permission, and will only use this information as necessary.

These are just a few examples of why we ask for information listed in our client questionnaire and how we use this information for your benefit. If you ever have a question about why we have requested certain information, please do not hesitate to contact us; we would be happy to discuss it with you.

The attorneys and staff of Hook Law Center take your privacy very seriously and will never disclose your information to third parties without your prior consent. For more information about Hook Law Center's services, please visit our website at www.hooklawcenter.com or contact us at (757) 399-7506.

Deer Ones

Hook Law Center: Kit Kat, what can a community do about its overpopulation of deer?

Kit Kat: Well, there are a couple of things communities can do to help these lovely creatures. Deer have always been a favorite of mine, but they are thriving so well in certain areas that they are creating problems. From a low in the deer population in the 1930s when they were near extinction, they have increased today to 30 million. Deer thrive in suburban areas where there is an adequate supply of food and where climate is relatively mild. They don't fare as well in densely-wooded areas in New England, for example. Some people have become frustrated with them, because they denude landscapes, wander into roadways, and can carry Lyme disease.

The 2 principal ways to reduce the deer population (without killing them) are 1) sterilization and 2) vaccination with the contraceptive vaccine PZP. Both are considered experimental. In order to use these methods, those who want to must apply to their states for authorization. The Humane Society of the United States (HSUS) has been active in sponsoring some of these nonlethal efforts. When a female deer is sterilized, her ovaries are removed and the wound is closed with surgical staples. Right now many of these surgeries are performed by volunteer veterinarians. With regard to vaccination, the female deer is shot with a dart gun containing PZP vaccine. However, this has to be repeated every 2-3 years. It is a relatively new technique, being used for the first time this year on a free-roaming population of deer in Hastings-on-Hudson, NY. Previously, it has been used in restricted communities such as an island. So stay tuned for progress about this wonderful effort! We want to return to the days when deer are not a nuisance, but a treasured part of the ecosystem.

(Karen E. Lange, "Out of Season," All Animals, May/June 2014, p. 16-23)

Upcoming Events

- Jessica Hayes will be speaking on Special Needs Trust at the Virginia Beach Central Library on **May 10, 2014** from 2:00 pm to 4:15pm.
- Andrew Hook will be speaking on Services Available to Seniors at the Major Hillard Library on **May 13, 2014** at 10:30am.
- Andrew Hook will be speaking on Financial Services Long-Term Care Insurance at the National Academy of Elder Law Attorneys (NAELA) Conference on **May 16, 2014** in Scottsdale, AZ. Mr. Hook will be attending the two-day conference.

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