

# Download File PDF Trustee Resolution Template Cpa

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Make the trust, will or power of attorney irrevocable or not subject to amendment or termination without joint beneficiary agreement, or court order, or both.

Schedule regular caregiver and family meetings to discuss and agree upon care condition and needs, and next steps.

Obtain in independent care or daily living need assessment.

Agree on a visitation schedule with Mom/Dad.

Have visits with Mom/Dad monitored, by an independent person.

Hire a care or case manager to oversee (and report) about Mom or Dad's daily living and care needed.

Hire live-in caregivers.

Hire caregiver assistance on a part-time basis.

Arrange for family members to provide daily living assistance.

Arrange for family members to provide live-in care.

Agree on a payment for family members who provide extra care or assistance that is beyond the level that would already be expected.

Allow for Mom or Dad to have access to an appropriately small bank account to help maintain independence and dignity.

Provide regular financial reports or documents to family members.

Provide regular care and living condition reports to family members.

Additional options? There are many, depending on the facts and circumstances of the specific situation.

**Conservatorship of the Person and/or Estate:**

Consider whether a conservatorship of the person is needed. Arrange for an assessment.

Consider whether a conservatorship of the estate is needed.

Page 3 of 5: David W. Tate, CPA, Esq. <http://davidtate.com>  
Sample Trust, Estate, Conservatorship, Power of Attorney,  
Naming Home and Elder Dispute Resolution Options

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