

Planning Modules

Fitzgerald Law Office has an extensive collection of tools and strategies available to address our clients' planning needs. It can be overwhelming for a particular client to sort through all of those capabilities and find what they need to answer a particular question or get a specific project done.

We organize our practice into Planning Modules to simplify things and allow clients to get directly to the point for what they want. The Planning Modules group together legal and planning issues that deal with similar subjects, apply the same law, are usually handled at the same time and fall within the same planning process.

The Planning Modules can help clients in a number of ways. First, by taking in an overview of the Planning Modules a client can understand where their particular question or issue falls within the big picture. Many clients are thinking about more than one question or issue at the same time. In that case, the Planning Modules can help the client organize their different ideas and break the different thoughts into more manageable chunks that are easier to work with.

Module	Sub-Categories			
Planning for Death	The People Who Inherit	The People In Charge	Probate & Non-Probate Transfers	Trusts to Protect and Manage the Inheritance for Minors or Adults
Planning for Incapacity	Power of Attorney	Special Needs Trust	Guardianship	
Business	Organizing an LLC or Corporation	Buy-Sell Agreements		
Protecting Assets	Planning Before Illness or Incapacity	Qualification and Application for Medicaid	Steps After Medicaid Eligibility Issues	Estate Recovery Planning
Estate Administration	Death of a Spouse	Probate Administration	Non-Probate Estate Administration	