YEW TREE FOUNDATION

How We Helped Janelle & Her Mom

1. CLIENT OVERVIEW

Janelle, a 48-year-old Tulsa resident, had always been close to her mother. But when her mom began forgetting small details and missed a few bill payments, Janelle realized she needed to act quickly. Her mother had no Power of Attorney or updated healthcare directives, leaving her vulnerable if her memory issues worsened.

2. CHALLENGES FACED

- No legal authority for Janelle to manage finances or healthcare decisions.
- Uncertainty about her mother's care preferences.
- Risk of family disagreements or legal delays if a crisis occurred.
- Emotional stress of initiating difficult conversations.

3. PLANNING STEPS TAKEN

- Completed an Oklahoma Healthcare Power of Attorney, HIPAA form and Advance Directive.
- Completed a Financial Power of Attorney to manage bills and accounts if needed.
- Reviewed retirement income sources and projected expenses.
- Created a basic care plan for later years, including costs and safety net options.
- Updated her will and beneficiary designations.
- Documented care preferences and organized important records.

4. RESULTS ACHIEVED

- Gained peace of mind knowing her wishes were documented and legally protected.
- Ensured Janelle could act quickly if decisions were needed.
- Reduced the risk of costly mistakes or court involvement.
- Preserved independence while putting safeguards in place.
- Strengthened their relationship about values and care.

5. REFLECTION

““It gave me a sense of control—not just for later, but for right now.”
— Janelle (name changed).

6. WHAT THIS MEANS

At Yew Tree, we don't start with numbers—we start with what matters most. For Teresa, that meant protecting her independence, honoring her values, and creating a legacy with dignity.
Her story reminds us that planning isn't just for the wealthy—it's for anyone who wants to live and leave life on their terms.

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