YEW TREE FOUNDATION

How We Helped David

1. CLIENT OVERVIEW

David (61) isn't married, doesn't have children, and doesn't consider himself particularly religious. But he does have a close circle of friends he thinks of as family, and a niece he hopes to support through college.

Though he had built up savings over the years, David was concerned about whether his money would last if he faced long-term care needs.

2. CHALLENGES FACED

- No clear decision-makers appointed for healthcare or finances.
- Outdated will that didn't reflect current priorities.
- Worry about long-term care costs consuming his savings.
- Desire to leave a legacy for his niece and a local animal shelter.
- Fear of "falling through the cracks" by not fitting a traditional family structure.

3. PLANNING STEPS TAKEN

- Drafted Healthcare Directive and Powers of Attorney.
- Updated his will to include both family and charitable wishes.
- Named trusted friends as decision-makers for healthcare and finance.
- Reviewed his retirement plan alongside projected care costs.
- Updated wills to care for family first while leaving a legacy gift for their church.
- Explored strategies to stretch savings and understand Medicaid basics.

4. RESULTS ACHIEVED

- Clear, legally valid documents in place for decision-making.
- A will that reflects both chosen family and values.
- Greater confidence that his savings can support care if needed.
- Peace of mind knowing chosen friends will speak on his behalf.

5. REFLECTION

"I don't fit the typical mold, but that doesn't mean I can't protect what matters most. Now my voice will be heard and my savings will go where I intend."
— David (name changed)

6. WHAT THIS MEANS

Planning isn't just for families or couples. It's for anyone who wants to make sure their wishes are honored, their savings are protected, and their loved ones—whoever they may be—are cared for.

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yewtreefoundation.org