

February 2014

Dear Clients and Friends:

Every once in a while you'll come across something that takes an existing idea and raises it to a whole new level. I recently discovered a form used by San Diego attorney Norman Michael Cooley ("Mike"), which greatly expands on the guidelines included in your advance health care directive or health care power of attorney.

Years ago he was thinking about how limited the instructions are in these basic forms. You can initial one of several paragraphs that have to do with treatment or life support, but the directions are general and leave a lot of room for interpretation. Many of my clients are concerned their spouse or children will order medical services they would rather not have, but how can you cover all the possibilities in one short document?

Well, Mike has done just that, and he found a way to make it fit on one page. You're able to consider four different scenarios based on your degree of incapacity and the medical prognosis, then you decide which treatments, tests or invasive procedures you would or would not want in each situation. This is time well spent, because the person making medical decisions on your behalf will know exactly what your wishes are.

Mike has kindly allowed me to post this form at www.cmsfinancial.com. From the downloads tab select the "Medical Instructions Form." If you don't have internet access, call my assistant Tara Taitague at (951) 506-2338, and she'll mail you a copy.

After you complete and sign the form, keep a copy with your health care directive. You may also want to give a copy to your primary care physician, to become a part of your permanent medical record.

Regards,



Charles M. Shackelford