

Probus Neutral Bay Guest Speaker – Tues. 13th August 2024

JAMES KELLY Partner, Owen Hodges Lawyers



“Accommodation Options for the Elderly and Their Interaction with Estate Planning”

INTRODUCTION...

It is a fact that as we age it may not be possible to continue living independently in our own homes. For some people there is a choice and for others there is no choice and/or the decision is made by your substituted decision maker.

Sometimes one spouse needs aged care while the other remains living in the family home.

In doing so, however, there are many matters to consider. There are emotional issues, financial issues and legal issues. If we leave our house, is it better to sell or rent it out?

Legal issues can include: the signing of contracts, compliance with Aged Care Acts, power of attorney and guardianship issues, wills and estate planning matters. Much to think about.

GUEST SPEAKER... James Kelly



James has worked in regional practice since 1991 and has developed his legal practice mainly in the area of "Elder Law". This is the law as it relates to seniors. In other words, general issues affecting older people.

James has been employed with Owen Hodge Lawyers since 1995 and was made a Special Agent in 2000. He is their head of the Seniors, Estates and the Residential Conveyance team.

James is actively involved with several seniors' groups and advisory committees. He also regularly addresses seniors' groups on legal issues.

HIS PRESENTATION...

In his presentation, James will consider some available options, financial and legal issues and how that impacts on your estate planning.