

FRIEDMAN
RANZENHOFER
ATTORNEYS AT LAW

74 Main Street-PO Box 31
Akron, NY 14001-0031
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(Not for service of process)

Areas of practice:
Accidents/Personal Injury
Corporate/Business/LLC
Criminal/Traffic/DWI
Divorce/Custody/Support
Elder Law/Guardianships
Landlord/Tenant
Matrimonial/Family Law
Municipal Law
Not-for-Profit Corporations
Probate/Estates
Real Estate
Trials/Appeals
Wills/Trusts

Per your request, enclosed please find the Will Information Sheet, our firm brochure and newsletter, directions to our offices and my business card.

These are the five steps in having your Will prepared by us:

- STEP ONE:** Complete both sides of the Will Information Sheet. Include complete addresses of all persons who will be named in your Will, Power of Attorney and Health Care Proxy.
- STEP TWO:** Call (716) 542-5444 or (585) 343-0746 to schedule an appointment with an attorney for the first consultation.
- STEP THREE:** Bring your Will Information Sheet with you to the appointment. Payment in the form of cash, charge or check is required at the first appointment.
- STEP FOUR:** Drafts of your documents will be mailed to you for your review.
- STEP FIVE:** A final appointment will be scheduled for you to sign your documents.

For the reasons stated on the enclosed "Why You Need a Health Care Proxy/Living Will", we highly recommend that you have those documents drafted. We will explain to you how our Health Care Proxies differ from those given to you by your doctor or hospital.

We look forward to seeing you to discuss your estate planning.

Batavia Office: 113 Main St. Batavia, NY 14020

Buffalo Office: 70 Niagara St. Buffalo, NY 14202

Clarence/Williamsville Office: 8207 Main St, Ste. 13, Williamsville, NY 14221

Rochester Office: 70 Linden Oaks, 3rd Floor, Rochester, NY 14625

West Seneca Office: 3686 Seneca St., West Seneca, NY 14224

Niagara Falls Office: 345 Buffalo Ave., Niagara Falls, NY 14303

DIRECTIONS TO OUR OFFICES

AKRON OFFICE

Our **Akron office** is located at **74 Main Street** at Clinton Street in the Village of Akron. Take Route 5 to Route 93 (Buell Street) to Main Street and proceed one block past the Bank of Akron. The total distance from Route 5 is 1.7 miles.

BATAVIA OFFICE

Our **Batavia office** is located at **113 Main Street** in the City of Batavia in the Ameriprise Financial office between Jackson and Center Streets.

ROCHESTER OFFICE

Our **Rochester office** is located at **70 Linden Oaks, 3rd floor** in the Town of Penfield. **From the East**, take NYS Thruway to Exit 45 to 490 West. Take the Linden Avenue Exit and make a right (East) onto Route 441 (.6 miles). **From the West**, take NYS Thruway to Exit 47 to Route 490 East. Take the Linden Avenue Exit and make a left (East) on to 441 (.6 miles). **From both directions**, turn right at Linden Oaks Office Park. Building 70 is the first building on the right. Take the elevator to the third floor, turn right and go to the first door on your right to "Office Suites of Linden Oaks".

WEST SENECA OFFICE

Our **West Seneca office** is located at **3686 Seneca Street, West Seneca, NY 14224**. Take the Ridge Road East Exit off of Route 219. Ridge Road turns into Seneca Street. 3686 Seneca Street is on the left in the Paramount Settlement building. The office is located 1.3 miles East of Route 219.

NIAGARA FALLS OFFICE

Our **Niagara Falls office** is located at **345 Buffalo Avenue** in the Whitney Mansion. Take the Robert Moses Parkway to 4th Street. Turn right onto 4th Street and left onto Buffalo Ave. Our office is on the left.

WILLIAMSVILLE/CLARENCE OFFICE

Our **Clarence/Williamsville office** is located at **8207 Main Street, Suite 13** in the Stonegate Office Park. It is .3 miles east of the intersection of Main & Transit Roads. The office park entrance is between Towne BMW and Mercedes Benz of Buffalo.

Please feel free to call us at (716) 542-5444 or (585) 343-0746 if you have any questions or visit wny-lawyers.com for a map.

WHY YOU NEED A POWER OF ATTORNEY, HEALTH CARE PROXY AND LIVING WILL

POWERS OF ATTORNEY

By signing a **durable power of attorney**, you can authorize another person or persons known as the “agent” or “attorney-in-fact” to act on your behalf to perform any number of specified acts. Powers of attorney are useful to manage your affairs if you subsequently become incompetent thus avoiding the need for a more complex and costly guardianship or trust.

There are two types of powers of attorney. The “general power of attorney” goes into effect as soon as it is signed notarized and initialed. The “springing power of attorney” is for those who are hesitant to grant a power of attorney while they are still able to manage their own affairs. The springing power of attorney takes effect at a specified future time or upon the occurrence of a specified contingency, such as the signing of a written statement by a physician or licensed psychologist or psychiatrist certifying that you are suffering from diminished capacity that precludes you from conducting your own affairs in a competent manner.

You can grant to your agent the power over some or all of the following transactions: real estate; personal property; bonds, shares and commodities; banking; operation of a business; insurance; lawsuits; benefits from military service; and records, reports and statements. A power of attorney is not a substitute for a will because it automatically terminates upon your death.

HEALTH CARE PROXIES

Your spouse or other relatives are not legally authorized to make medical decisions on your behalf unless that authority is delegated to them by a living will and health care proxy. **Health care proxies** recognize your right to appoint a health care agent that you trust to decide about medical treatment in the event that you become unable to decide personally. Unless specified otherwise, the agent will have the same authority that you would have in deciding about treatment. The authority encompasses the right to forego treatment or to consent for needed treatment. The agent’s authority begins only when a physician determines that you have lost the capacity to decide about treatment.

LIVING WILLS

Living wills are written declarations instructing your family and doctor about life-prolonging medical procedures when your condition is terminal and there is no chance of medical recovery. Under constitutional and common law, patients have the right to refuse medical treatment. A living will gives you the opportunity to express your wishes in advance, since you may not be able to make them known when it becomes necessary to do so. Life-prolonging procedures include the use of machines if you cannot breathe on your own, performing operations or prescribing antibiotics that cannot realistically increase the chances of recovery, starting your heart mechanically when it stopped beating, or feeding by tube.

**Please bring this completed form
to your appointment.
(Do not mail it to us)**

Areas of practice:
Accidents/Personal Injury
Corporate/Business/LLC
Criminal/Traffic/DWI
Divorce/Custody/Support
Elder Law/Guardianships
Landlord/Tenant
Matrimonial/Family Law
Municipal Law
Not-for-Profit
Corporations
Probate/Estates
Real Estate
Trials/Appeals
Wills/Trusts

INFORMATION FOR WILLS

Your appointment is scheduled on ___/___/___ at _____ a.m./p.m. at our Akron/Batavia/ Clarence/
West Seneca/Niagara Falls/Rochester office with Robert Friedman/Michael H. Ranzenhofer

1. Name: _____ Spouse Name: _____

Street Address: _____

City, County, State & Zip Code: _____

Home Phone No. _____ Business Phone No. _____ Fax No. _____

Cell Phone/Pager No. _____ Email: _____

DOB: _____ Social Security Number: _____

Occupation/Employer: _____

Spouse's Occupation/Employer: _____

Spouse's DOB: _____ Spouse's Social Security Number: _____

Citizenship: _____ Referred By: _____

2. All relatives who would share in your property if you had no Will (e.g. children, parents or siblings):

| <u>Name</u> | <u>Address</u> | <u>Date of Birth</u> | <u>Relationship</u> |
|-------------|----------------|----------------------|---------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

3. Any prior marriages for you or your spouse? _____

4. Names of step-children: _____

5. Do you have a safe deposit box? _____ If so, where? _____

6. Do you have a: Living Will? _____ Health Care Proxy? _____
Power of Attorney? _____ Living Trust? _____

7. Which of the above items would you like us to prepare? _____

8. Date and location of old Will: _____

TURN OVER

9. Who do you want to act as Guardian or Trustee of your children?

Name/Address/Relationship: _____

10. Who do you want to act as Executor and Alternate Executor?

Name/Address/Relationship: _____

11. List all life insurance policies:

| <u>Company</u> | <u>Type</u> | <u>Face Value/Cash Value</u> | <u>Beneficiary</u> <u>1st and 2nd</u> |
|----------------|-------------|------------------------------|--|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

12. List bank accounts, CDs and money market funds (individual and joint):

| <u>Bank/Institution</u> | <u>Type of Account</u> | <u>Approx. Bal.</u> | <u>Name of Owners</u> |
|-------------------------|------------------------|---------------------|-----------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

13. List all real estate (individual and joint):

| <u>Brief Description</u> | <u>Value</u> | <u>Mortgage Balance</u> | <u>Name of Owners</u> |
|--------------------------|--------------|-------------------------|-----------------------|
| _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ |

14. List all retirement plans, IRAs, 401-Ks, etc.: _____

15. Stocks, bonds, mutual funds and annuities (individual and joint):

| <u>No. of Shares</u> | <u>Class</u> | <u>Company</u> | <u>Value</u> | <u>Name of Owners</u> |
|----------------------|--------------|----------------|--------------|-----------------------|
| _____ | _____ | _____ | _____ | _____ |
| _____ | _____ | _____ | _____ | _____ |

16. List any other property you own or in which you have an interest, including business interests, notes or mortgages owed to you, autos, boats, valuable jewelry, art work, etc.

17. Would you like us to hold your original will in safekeeping? _____

18. Who do you want to leave your estate to? _____

19. Are you or any of your beneficiaries disabled? _____