



Thomas M. Cooley Law Libraries' Research Guide Series

ELDER LAW: A Selective Research Guide

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Overview:

This research guide is a selective guide to assist the legal researcher in conducting research in the area of Elder Law. It is not comprehensive in scope or intended to be a catchall source, but rather to act as a starting point for the researcher to find additional sources and relevant information. Elder Law encompasses many different fields of law. This guide attempts to provide a selection of sources for the major areas of Elder Law such as estate planning, Medicaid, long-term care, Social Security, elder abuse, and age discrimination in employment.

I. MICHIGAN TREATISES

Advising the Older or Disabled Client, 3rd ed., edited by George A. Cooney, David L. Schaltz, Douglas G. Chalgian

Location: [KFM4291.A3 A38](#) (L)

The publication by the Institute for Continuing Legal Education (ICLE) is a comprehensive guide for lawyers who advise older clients and clients with disabilities. It covers long-term care, health care benefits, Medicare & Medicaid eligibility, guardianships and conservatorships, special needs trusts, and social security benefits.

Counseling the Elderly Client in Michigan edited by Katherine Martin

Location: [KFM4291 .A3 M37 1991](#) (L)

This two-volume looseleaf set covers topics such as Social Security, Medicare, Medicaid, Veterans' benefits, and discrimination.

Planning for Estates and Administration in Michigan by Frederick K. Hoops.

Location: [KFM4340 .H66 1983](#) (L, AH, GR, AA)

This exhaustive multi-volume set offers in-depth discussion and step-by-step guidance for every stage of the estate planning process. Topics covered include intestate and testate succession, probate, trusts, gifts, insurance, guardians and conservators.



Fundamental Issues in Elder Law by David L. Carrier

Location: [KFM4291.A3 F86 2006](#) (L, AH, GR)

This monograph contains practitioner-authored discussions of various long-term care issues in Michigan, including geriatric care management, Medicaid planning in probate courts, and guardianships and conservatorships.

II. MICHIGAN GUIDES

Advanced Issues in Michigan Elder Law by Sandra J. Chapp et al.

Location: [KFM4291.A3 C53 2003](#) (L)

Covers topics such as revitalizing your elder law practice, covering the costs of long-term care, guardianships and conservatorships.

Advancing Smartly: A Legal Handbook for Michigan Women Age 60+ by Katherine A. Martin and Robert Carowitz

Location: [KFM4291.W6 M374 2001](#) (L, AA)

The handbook provides information and advice on the legal issues that affect women as they age. Written in everyday English, and printed in large type, the book is geared exclusively to the legal needs of older women. Some of the topics include healthcare, money and financial issues, Medicaid and Medicare, insurance, and estate planning.

Elder Care in Michigan: Legal and Financial Issues by Doug G. Chalgian et al.

Location: [KFM4291.A3 C49 2003](#) (L, AH)

The book explains how to manage residential, financial and medical matters as well as the legal issues that accompany them. The target audience is anyone who is involved in caring for, assisting, or helping a senior.

Estate Administration in Michigan by George A. Cooney et al.

Location: [KFM4344.C663](#) (L, AH, GR)

This manual provides a step-by-step guide to administering estates under EPIC. It explains supervised and unsupervised administration, includes comprehensive checklists of steps and dates, and explains how to fill out SCAO-approved forms.

Long Term Care Legal Resource Manual by Elder Law of Michigan, Inc

Location: [KFM4482.O4 A3 2005](#) (L)

Provides excerpts from federal and state laws, regulations, and manuals dealing with long-term care.

Michigan Elder Care Planning; How to Protect Assets and Provide for Services by Catherine C. Metzler, Michelyn E. Pasteur

Location: [KFM4340.Z9 M47 2005](#) (L, AH, GR)

Covers topics such as planning for long-term disability, preserving family assets when qualifying for Medicaid, and estate plans.



Michigan Estate Planning Handbook edited by Carol J. Karr et al.

Location: [KFM4340 .M53](#) (L, AH, GR)

Covers planning the estate; drafting revocable trusts, wills, and durable powers of attorney; and implementing the estate plan. Includes comprehensive will and trust forms and additional more concise template forms.

Michigan Estate Planning, Will Drafting and Estate Administration Forms by Joyce Q. Lower and Henry M. Grix

Location: [KFM4340 .A65 L69 1989](#) (L, AA)

This two-volume looseleaf manual contains forms, checklists, and supporting text material. The authors provide extensive commentary and analysis of estate planning and estate administration issues.

The Michigan Long Term Care Companion: How to Make the System Work for You and What to do When it doesn't edited by Michael Connors and Lydia Rizzo.

Location: [RA997.5 .M5 M52 1998](#) (L)

Covers topics such as long-term care, planning & decision-making, paying for care, nursing homes. Available in the Lansing Clinical Library.

Michigan Probate Litigation: a Guide to Contested Matters

Location: [KFM4344 .M53](#) (L, AH, GR)

This looseleaf ICLE publication explains how to handle commonly litigated probate matters: intestacy, will contests, creditors' claims, breach of fiduciary duties, attorney fees, and more. Includes sample forms and pleadings.

Michigan Probate Sourcebook

Location: [KFM4344 .M52](#) (L, AH, GR)

This ICLE looseleaf publication compiles all the MI statutes, rules, and forms that are needed for probate practice. Also includes Probate Court Rules, other statutes related to probate, and selected federal and SCAO forms.

Trust Administration under the Michigan Trust Code edited by Daniel E. Cogan and Marlaine C. Teahan

Location: [KFM4347 .T782 2010](#) (L, AH, GR)

This ICLE publication is an extensive guide to administering trusts under EPIC. It includes helpful checklists, schedules and sample letters, petitions and orders.

III. NATIONAL TREATISES

Aging and the Law by Peter J. Strauss, Robert Wolf, and Dana Shilling

Location: [KF390 .A4 S83 1990](#) (L, eBook via CoolCat record)

This looseleaf treatise is co-authored by Peter Strauss who is a nationally known pioneer in the field of Elder Law. The treatise contains comprehensive chapters on Medicare-Medicaid, as well as long-term care and housing alternatives.



Controversies in Ethics in Long-term Care by Ellen Olson et al.

Location: [R726 .C673 1995](#) (L)

The target audience for this comprehensive overview of ethical issues in long term care includes geriatricians, ethicists, and long-term care administrators. This book will provide attorneys with valuable insight into some of the major ethical issues encountered by their clients in long-term care.

Elderlaw: Advocacy for the Aging 2nd ed. by Joan M. Krauskopf et al.

Location: [KF390 .A4 E42 1993](#) (L, GR)

This two-volume set is a comprehensive reference on the practice of elder law. Some of the topics covered are age discrimination, consumer credit protection, managing incapacity, Medicaid, and food stamps.

Elder Law Portfolio Series by Harry S. Margolis.

Location: [KF390 .A4 E465 1993](#) (L)

Each of the twenty-four portfolios in this series is an essay on a unique aspect of elder law. Topics include: nursing home litigation, grandparents' visitation, age discrimination in employment. The portfolios are updated periodically.

Guardianship & Conservatorship: a Handbook for Lawyers by Scott K. Summers

Location: [KF553 .S85 1996](#) (L)

Although not specifically about guardianship for the elderly this handbook describes the guardianship proceeding. It is a useful overview of the process for practitioners.

Handbook on ERISA Litigation by James F. Jorden et al.

Location: [KF3512 .J67](#) (2007 ed. at GR, AH; 1992 ed. at L)

This handbook details the requirements of ERISA with extensive citations to the statute, regulations and case law. Helpful litigation checklists and forms are provided on key aspects of ERISA litigation.

Handling Your First Health Care Proxy, Living Will and Durable Power of Attorney by Jonathan J. Rikoon.

Location: [KF3827 .E87 H36 1992](#) (L)

This Practising Law Institute handbook includes advice and practical information related to the drafting of a proxy or living will. It also includes a discussion of assessment of the patient's capacity to consent, and "do not resuscitate orders".

The Law of Trusts by Austin Wakeman Scott and William Franklin Fratcher.

Location: [KF730 .S3 1987](#) (L, AH, GR, AA)

Widely regarded as the leading authority on the law of trusts, this treatise offers practical advice on the creation, administration, and termination of all kinds of trusts, as well as incisive analysis of the underlying principles of trust law.



The Law of Trusts and Trustees: A Treatise Covering the Law Relating to Trusts and Allied Subjects Affecting Trust Creation and Administration: with Forms by Amy M. Hess et al.

Location: [KF730 .B63 2010](#) (L, AH, GR)

This multi-volume treatise discusses the legal issues of different types of trusts, the powers and duties of trustees, remedies available to beneficiaries, and other issues surrounding trusts and trustees.

Mental Capacity: Legal and Medical Aspects of Assessment and Treatment by Arthur C. Walsh et al.

Location: [KF480 .M45](#) (L; AH updated to 1993)

This looseleaf source was authored by a team of psychologists, a physician, as well as an experienced elder law attorney. The resource provides expert guidance on how to assess mental incapacity and incompetency. The authors summarize the law on different types of mental capacity required to perform different legal transactions; discuss the medical causes, symptoms, and treatments of different types of incapacity and incompetency, and offer advice on evaluating, contesting, and defending legal capacity.

Page on the Law of Wills by William H. Page

Location: [KF755 .P32](#) (L, AH, GR)

This multi-volume treatise covers probate, will contests, evidence, taxation, conflicts, estate planning, forms, and statutes relating to wills. Kept up to date by pocket part supplements.

Restatement of the Law (Third), Property: Wills and Other Donative Transfers by the American Law Institute

Location: [KF613 .R4765 1999](#) (L, AH, GR, AA)

This multi-volume title presents a comprehensive treatment of the American law of wills, will substitutes, intestacy, gifts, present and future interests, and other topics.

Restatement of the Law (Third), Trusts by the American Law Institute

Location: [KF730 .R47 2003](#) (L, AH, GR, AA)

This two-volume title draws both on court decisions and on statutes to provide extensive treatment of trust law. Some of the topics covered are definitions and distinctions, the creation of a trust, trust property, the trustee, and the beneficiary.

IV. NATIONAL GUIDES

Advance Health Care Directives: a Handbook for Professionals by Scott K. Summers and Carol Krohm

Location: [R726.2 .S85 2002](#) (L)

Authored by a lawyer and a physician, this volume covers subjects such as ethics of advance health care directives, competence and incompetence, perspective of family and friends, attorney and health care provider perspective, alternatives in the absence of directives. Appendices 1 through 16 include federal and state statutes, Spanish language and other sample forms, sample religious directives. Includes CD-ROM containing Advance Health Care Directives state statutes.



Advising the Elderly Client edited by Louis A. Mezzulo et al.

Location: [KF390 .A4 A326](#) (L, AH, AA)

This looseleaf set provides a comprehensive survey of the major legal issues facing elderly clients. Some of the topics covered are financial and estate planning, Social Security, Medicaid, and discrimination.

Age Discrimination 2nd ed. by Howard C. Eglit

Location: [KF3465 .E38 1994](#) (L, GR)

This resource explores perspectives of both employees and employer on age discrimination questions. It provides an extensive, analytical explanation of the Age Discrimination in Employment Act (ADEA).

Age Discrimination Litigation by L. Steven Platt and Cathy Ventrell-Monsees

Location: [KF3465 .A6 P51](#) (L)

This looseleaf guide takes a practitioner through the stages of an age discrimination case. It starts with the EEOC complaint process, then discusses court litigation: complaint, discovery, use of experts, summary judgment, proving a claim, jury trial, remedies. Includes CD-ROM with forms.

Aging Sourcebook: Basic Information on Issues Affecting Older Americans, Including Demographic Trends, Social Security, Medicare, Estate Planning, Legal Rights, Health and Safety, Elder Care Options, Retirement Lifestyle Options, and End of Life Issues edited by Dan R. Harris

Location: [HQ1064 .U5 A6365 1998](#) (L)

Contains comprehensive chapters on tax issues of older Americans as well as Medigap and other types of private insurance. The target audience is the lay public people rather than the legal community. Available in the Lansing Clinical Library.

Assessment of Older Adults with Diminished Capacity: A Handbook for Lawyers by ABA Commission on Law and Aging and American Psychological Association

Location: [KF390 .A4 A874 2008](#) (L)

This handbook represents a unique collaboration of lawyers and psychologists. It offers elder law attorneys, trusts and estates lawyers, family lawyers, and general practitioners a conceptual framework and practical system for addressing problems of client capacity, in some cases with help from a clinician.

CCH Financial and Estate Planning Guide by Sydney Kess and Bertil Westlin

Location: [KF6296 .A15 C4](#) (L)

Professionals who structure, tailor and administer financial and estate plans will benefit from this guidebook. Some of the topics covered are trusts, wills, life insurance and annuities, social security, as well as in depth review of investment vehicles.

The Complete Legal Guide to Senior Care by Brette McWhorter Sember Location:

[KF390.A4 S42 2008](#) (L, AH, GR)

The book explains how to manage residential, financial and medical matters as well as the legal issues that accompany them. The target audience is anyone who is involved in caring for, assisting, or helping a senior.



Counseling Older Clients by Alison McChrystal Barnes et al.

Location: [KF390 .A4 B37 2005](#) (L, GR)

The book provides a concise introduction to all the major areas of aging and the law: retirement income, estate planning, health care insurance and benefits, long-term care housing and services, guardianship and health care decision making, ethics, and counseling. Available in Lansing's Clinical Library.

Drafting Wills and Trust Agreements by Michael L.M. Jordan

Location: [KF748.1 .W552](#) (L, AH)

This multi-volume looseleaf set provides information on drafting wills and trust agreements using an estate planning system. Explains the federal tax law and state law pertinent to estate planning, with in-depth discussions on generation-skipping transfers and individual trustees. Identifies problem areas and possible solutions in using individuals as trustees. Provides suggestions for helping clients understand the estate plan. Includes forms and checklists.

Elder Law Answer Book by Robert B. Fleming

Location: [KF390 .A4 F58 2004](#) (L)

This title contains elder law related questions and answers. Some of the topics covered are: establishing and managing an elder law practice, estate and retirement planning, and paying for medical and long-term care.

Elder Law and the Deficit Reduction Act of 2005: with Analysis by the LexisNexis Elder Law Editorial Board, David M. English, et al.

Location: [KF3737 .A318 E53 2006](#) (L, AH)

This LexisNexis publication contains materials relating to the Deficit Reduction Act of 2005 (DRA), which made significant changes to the Medicaid system. The contents include the text of the Medicaid-related parts of the act, legislative analysis, a letter by Senator Waxman setting out possible Constitutional grounds for challenging the act, and a redlined version of the relevant provisions of the act as it appears in the U.S.C.S.

The Elder Law Handbook: A Legal and Financial Survival Guide for Caregivers and Seniors by Peter J. Strauss and Nancy M. Lederman

Location: [KF390 .A4 S833 1996](#) (L)

This handbook offers explanations of topics such as Medicaid, health insurance, and long-term care. The chapter on financing long-term care explains the types of care available, the role Medicare plays, what home healthcare benefits are allowed, the intricacies of long-term care insurance, and some creative options for funding care. Sections on estate and gift taxation, workplace protections for aging workers, disabilities planning, and adult communities are equally thorough.

Estate Planning: a Practical Guide by William W. Brown

Location: [KF750 .Z9 B762](#) (AH, GR)

The guide provides treatment of topics such as wills, powers of attorney, corporations, survivorship deeds, trusts, client relations and selecting a personal representative. In addition, the guide helps the attorney determine which forms to use, when to use them, the meaning of each paragraph within the forms and how to explain them to clients.



Guardianship and Conservatorship: A Handbook for Lawyers by Scott K. Summers

Location: [KF553 .S85 1996](#) (L)

Although not specifically written for elder law attorneys this handbook provides a good overview of guardianships and a step-by-step guide of the guardianship process.

Guardianship of the Elderly: Psychiatric and Judicial Aspects by George H. Zimny, George T. Grossberg

Location: [KF553 .G83 1998](#) (L)

The book describes the legal basis for guardianship, the procedures typically followed in a guardianship proceeding, and the monitoring of guardians.

Incapacitated and Alone: Health-care Decision-Making for the Unbefriended Elderly by Naomi Karp and Erica Wood

Location: [KF390 .A4 K37 2003](#) (L)

The focus of this work is on improving the quality of decision-making for the subset of older patients who lack the capacity to make their own health-care decisions and also lack anyone who could decide in their stead. The book identifies the obstacles to sound decision-making under these circumstances and identifies potential solutions.

Irrevocable Trusts 3rd ed. by George M. Turner

Location: [KF730 .T872](#) (L, AH)

This two-volume looseleaf set provides a comprehensive look at the types of trusts used for estate planning, the income tax implications of irrevocable trusts, involvement with the IRS, and the calculation of assets being transferred to the trustee. Updated annually.

The Law of Trusts 4th ed. by Austin Wakeman Scott and William Franklin Fratcher.

Location: [KF730 .S3 1987](#) (L, AH, GR)

Widely regarded as the leading authority on the law of trusts, this treatise offers practical advice on the creation, administration, and termination of all kinds of trusts, as well as incisive analysis of the underlying principles of trust law.

The Lawyer's Guide to Elder Injury and Accident Compensation 2nd ed. by James T. O'Reilly

Location: [KF1257 .O73 2004](#) (L)

Provides an overview of elder injuries. Covers topics such as counseling the elder accident victim, preparing the elderly client as a plaintiff, falls and their legal consequence.

Legal and Healthcare Ethics for the Elderly by George Patrick Smith.

Location: [KF3821 .S64 1996](#) (L)

This book discusses legal and healthcare topics such as treatment decisions, advance directives, patient autonomy, informed or negotiated consent, and healthcare rationing.

Medicare and Medicaid Claims and Procedures by Harvey L. McCormick.

Location: [KF3605 .M3 2005](#) (L, AH)

This practice tool provides references to relevant case law, statutes and regulations. It also provides a description of the administrative fair hearing process.



Medicare and Medicaid Guide

Location: [KF3608 .A4 M42 1969](#) (L, AH)

This resource published by Commerce Clearing House is a mini-library on the subject of Medicare and Medicaid system. It is very useful for the Medicare and Medicaid case law researcher.

National Survey of State Laws

Location: [KF386 .N38](#) (L, AH, GR, AA)

This reference book presents in chart form state by state comparisons of current state laws. Each law is described in general terms and is followed by detailed charts of each state's laws. Entries are then referenced to a specific code or statute to enable the reader to access the detailed text of the law elsewhere. The book is organized in 8 parts. "Elder Law" related statutes (such as "Living Wills", "Right to Die", are listed in Part 6 (under General Civil Laws).

Nursing Home Negligence by Margaret C. Jasper

Location: [KF3826 .N8 J37 2003](#) (L, AH)

The book provides a good overview of nursing home negligence issues such as legal rights of nursing home residents, nursing home neglect, abuse, and remedies (written for lay people).

Representing the Elderly Client: Law and Practice by Thomas D. Begley, Jr. and Jo-Anne Herina Jeffreys

Location: [KF390 .A4 B44 2004](#) (AH, GR)

This looseleaf publication addresses the six areas an elder law attorney will encounter most often: Medicaid, special needs trusts, Medicare and managed care, elder abuse, nursing home and LTC facilities, and intra-family and postmortem advocacy for elderly clients and heirs. There is a companion CD with forms.

Revocable Trusts 5th ed. by George M. Turner

Location: [KF734 .T8723](#) (L, AH)

This four-volume looseleaf set provides comprehensive information on how to draft, analyze, present, and execute a contemporary living trust in any of its many forms and constructions. Contains more than 100 forms, letters, sample wills, and other guides.

Social Security Law and Practice edited by Michael A. Rosenhouse et al.

Location: [KF3646.5 .S63 1987](#) (L, AH, AA)

This nine-volume looseleaf set includes a comprehensive description of the Social Security program with citations to the statute, regulations, and case law.

Understanding Elder Law: Issues in Estate Planning, Medicaid, and Long-term Care Benefits by L. Rush Hunt et al.

Location: [KF390 .A4 H86 2002](#) (L)

The handbook provides a broad introduction to the legal rights of the elderly. Some of the topics covered are how to draft advance directives, a discussion of the major federal benefits programs, Medicaid eligibility, and tax planning issues.



West's Social Security Reporting Service

Location: [KF3649 .A1 W47 1983](#) (L)

This source consolidates statutes, regulations, court decisions, and agency rulings. Cases include decisions reported in West's print reporters and on Westlaw. There is an extensive index and a digest volume, which reiterates entries in West's Federal Digest.

V. NUTSHELLS/HORNBOOKS

Elder Law in a Nutshell by Lawrence A. Frolik, Richard L. Kaplan

Location: [KF390 .A4 F752 2010](#) (L, AH, GR, AA)

This source provides an overview of the different issues encountered in Elder Law. Discusses Medicare, Medigap, Medicaid, and long-term care insurance. Looks into living arrangements, guardianship, and benefits—Social Security, supplemental security income, veterans benefits, and pension plans. Also explores age discrimination in employment, elder abuse, and neglect.

Handbook of the Law of Wills and Other Principles of Succession, Including Intestacy and Administration of Decedents' Estates by Thomas E. Atkinson

Location: [KF755 .A7 M44 1953](#) (L, AH, GR, AA)

This Hornbook provides an extensive discussion on the points of law, with practical suggestions for the drafting and execution of wills. Addresses matters relevant to the administration of a decedent's estate, descent and distribution, and estate administration. Also touches briefly on issues such as property, insurance, taxation, and conflict of laws in order to present a fair picture of the law of succession.

Introduction to Estate Planning in a Nutshell by Robert J. Lynn and Grayson M.P. McCouch

Location: [KF750 .L9 2004](#) (L, AH, GR, AA)

This hornbook provides an overview of estate planning issues. Some of the topics covered are simple wills, lifetime gifts, and charitable trusts.

Uniform Probate Code and Uniform Trust Code in a Nutshell by Lawrence H. Averill, Jr. and Mary F. Radford

Location: [KF765 .Z95 A94 2010](#) (L, GR, AH, AA)

The source provides an overview of the Uniform Probate Code. Topics covered include probate jurisdiction of the courts and probate of wills and administration.

Wills and Trusts in a Nutshell by Robert L. Menell

Location: [KF755 .Z9 M38 2007](#) (L, AH, GR, AA)

The source provides an overview of wills and trust matters. Some of the topics covered are intestacy, elements of a trust, and trustee powers and duties.

Wills, Trusts, and Estates: Including Taxation and Future Interests by William M. McGovern Jr. and Sheldon F. Kurtz

Location: [KF755 .M34 2004](#) (L, AH, GR)

This hornbook provides an overview of federal gift, estate, and generation-skipping transfer tax laws. Other subjects include intestacy, and power of disposition limits.



VI. JOURNALS

Aging Alert

Location: [HQ1064 .U6 M5](#) (L)

This newsletter is published by the Area Agencies of Aging Association of Michigan. It covers new developments in long-term care reform, latest news on Medicare Part D, changes in Social Security, Medicaid, etc.

Bifocal

Location: [KF390 .A4 B54](#) (L; Online via CoolCat)

This newsletter of the ABA Commission on Law and Aging, features articles by and for experts in the law and aging field, reports on innovative delivery of legal assistance to older persons, and news on activities of state and local elder bar groups.

The Elder Law Journal

Location: [K5 .L34](#) (L)

The Elder Law Journal is an academic publication published twice annually by the students of the University of Illinois College of Law. The Elder Law Journal is the only scholarly publication addressing elder law issues in the country. Available to the Cooley community on the Internet through HeinOnline.

The Elderlaw Report

Location: [KF390 .A4 E43](#) (AH)

This source is the premier newsletter covering elder law issues. Edited by Harry S. Margolis, a renowned expert in the field, this monthly newsletter keeps legal professionals current with critical developments in elder law, and supplies real-world solutions to the unique legal problems facing senior clients.

NAELA Journal/National Academy of Elder Law Attorneys

Location: [KF390 .A4 N34](#) (L)

The NAELA Journal is a semiannual law journal containing substantive and scholarly articles by practicing NAELA members, professors, and other elder law professionals.

Aging News Alert: The Senior Services & Funding Report

Location: [HV1451 .A354](#) (L)

The journal reports on such issues as health care, housing, and legal issues facing the elderly.

VII. FORMS

American Jurisprudence Legal Forms

Location: [KF170 .A542](#) (L, AH, GR, AA)

This multi-volume form compilation includes forms dealing with the areas of trusts, wills, and estates.

ElderLaw Forms Manual: Essential Documents for Representing the Older Client by Harry S. Margolis

Location: [KF390 .A4 M37 1992](#) (L, GR)



This looseleaf manual contains more numerous forms, with commentary by the author. One especially useful aspect of this work is that it contains alternative clauses, allowing the forms to be more easily adapted to particular circumstances.

Michigan Legal Forms edited by Jason Pariseau

Location: [KFM4268 .M53](#) (L, AH, GR, AA)

The multi-volume form compilation contains sections on estate planning, elderly persons, and guardianships.

Forms found on Westlaw & Lexis:

Westlaw

[American Jurisprudence Legal Forms 2d](#) (AMJUR-LF)
[Bogert's Trusts and Trustees](#) (BOGERT)
[Michigan Legal Forms](#) (MI-LF)
[Michigan SCAO Approved Forms](#) (MISCAO-FRM)
[RIA Estate Planning Collection Complete](#) (RIA-EST)
[West's Legal Forms](#) (WEST-LF)
[West's McKinney's Forms - Estates and Surrogate Practice](#) (MCF-ESP)

Lexis

[Estate Planning Forms and Clauses](#) (ESTPLF)
[Living Trusts: Forms & Practice](#) (LTRUST)
[Murphy's Will Clauses: Annotations with Tax Effects](#) (MURPHY)
[Rabkin & Johnson Current Legal Forms with Tax Analysis](#) (CLFTA)
[Tax, Estate & Financial Planning for the Elderly: Forms and Practice](#) (TAXELD)

VIII. DATABASES

Westlaw

[Begley and Hook: Representing the Elderly or Disabled Client](#) (WGL-REPELDER)
[Frolik and Brown: Advising the Elderly or Disabled Client](#) (WGL-ADVELDER)
[Elderlaw: Advocacy for the Aging](#) (ELDERLAW)
[Elder Law Journal](#) (ELDLJ)
[Estate Planning Materials Course Handbooks and Reference Books](#) (PLIEST-ALL)
[Estate Planning Treatise Multibase](#) (ESTPLANPUBS)
[Family Estate Planning Guide](#) (FAMEPGD)
[HDR-Elderly Housing](#) (HDR-202HOUSE)
[Marquette Elder's Advisor](#) (MARQEA)
[Medicare and Medicaid Claims and Procedures](#) (MEDCLAIMS)
[Medicare Manuals CMS](#) (FHTH-CMSMAN)
[NAELA JOURNAL](#) (NAELAJ)
[Planning an Estate: A Guidebook of Principles and Techniques](#) (ESTPLNGD)
[Restatement of the Law –Trusts](#) (REST-TRUST)
[RIA Estate Planning Collection Complete](#) (RIA-EST)
[WG&L Combined Estate Planning and Estate Taxation Treatises](#) (WGL-TAXTEST)



Lexis

[The Elder Law Journal](#) (ELDLJ)

[Elder Law Weekly](#) (ELDLW)

[Injuries and Disorders in the Elderly](#) (IADITE)

[MH Legal Articles - Elder Law](#) (ARTELD)

[National Academy of Elder Law Attorneys Journal/Quarterly](#) (NAELAQ)

[Scott and Ascher on Trusts](#) (SCOTT)

IX. INTERNET RESOURCES

American Association of Retired Persons

<http://www.aarp.org>

Besides general interest articles for older adults, this web site contains excellent research reports on topics such as Medicare, prescription drug plans, and financial planning.

ABA Commission on Law and Aging

http://www.americanbar.org/groups/law_aging.html

Provides information on legislative updates, publications, CLE & conference materials related to elder law.

Administration on Aging

<http://www.aoa.gov>

Official U.S. Government site provides excellent information on services for elderly and their care givers.

Assessment of Older Adults with Diminished Capacity: A Handbook for Lawyers by the American Bar Association Commission on Law and Aging and the American Psychological Association

<http://www.apa.org/pi/aging/resources/guides/diminished-capacity.pdf>

This handbook represents a unique collaboration of lawyers and psychologists.

The book offers a conceptual framework and practice tips for addressing problems of client capacity.

Benefits Check Up

<http://www.benefitscheckup.org/>

BenefitsCheckUp is a service of the National Council on Aging. In addition to identifying the programs that a person may be eligible to receive, BenefitsCheckUp also provides a detailed description of the programs, local contacts for additional information (typically the addresses and phone numbers of where to apply for the programs), and materials to help successfully apply for each program.

Centers for Medicare & Medicaid Services

<http://www.cms.gov/home/medicaid.asp>

Official Centers for Medicare & Medicaid Services web site. This site is geared towards researchers and health care providers rather than people on Medicare. The web site contains a wealth of information on such topics as regulations & guidance, Medicare provider & enrollment certification, state Medicaid plans & amendments, coding, billing, and payment information.



USA.gov

<http://www.usa.gov>

FirstGov.gov is the official U.S. portal to all online government information and services—federal, state, local, and tribal.

Benefits.gov

<http://www.benefits.gov>

Official U.S. Government site provides information about benefit programs that benefit individuals and have eligibility rules. Types of programs included are federally and state funded and administered government programs. Site contains questionnaires which aid citizens in determining eligibility for programs.

Index of SCAO Approved Forms For Use In Michigan Probate Court

<http://www.courts.michigan.gov/scao/courtforms/probate/gpindex.htm#estate>

This official Michigan Courts web contains an extensive collection of forms for use in Probate Court. Examples of forms included are: Registration of Trust, Acceptance of Appointment and Report of Guardian Ad Litem, Letters of Conservatorship.

Judicial Determination of Capacity of Older Adults in Guardianship Proceedings: A Handbook for Judges by the ABA Commission on Law and Aging, American Psychological Association, and the National College of Probate Judges

http://www.americanbar.org/content/dam/aba/migrated/aging/docs/judges_book_5_24_authcheckdam.pdf

The National College of Probate Judges calls this electronic book a "ground-breaking work [that] provides welcome tools for judges, attorneys, clinicians, investigators, guardians ad litem, evaluators and scholars concerned with capacity issues facing older adults."

Lawyer's Tool Kit for Health Care Advance Planning 2nd Edition

http://apps.americanbar.org/aging/publications/docs/lawyers_tool_kit_bk.pdf

This publication was produced by the ABA Commission on Law and Aging. The purpose of the tool kit is not to help attorneys prepare advance directive documents but rather to provide attorneys with tools they can give to clients to help them with advanced planning.

Medicare

<http://www.medicare.gov/>

Official U.S. Government Site for People with Medicare. Contains the latest information on Medicare enrollment, eligibility, benefits, nursing homes, home health care benefits, and other helpful tools.

Medicare: Nursing Home Compare

<http://www.medicare.gov/nhcompare/home.asp>

This official U.S. Department of Health and & Human Services web site allows users to search for a nursing home by geographic location (state and county), proximity (city or zip code) or by nursing home name. Search results include basic information such as Medicare/Medicaid participation, number of certified beds, type of ownership, as well as detailed information regarding State Agency Survey results.



MiSeniors.Net

<http://www.miseniors.net/>

Official web site of the Michigan Office of Services to the Aging. Provides information on services available for Michigan seniors, such as home delivered meals, adults day care, Michigan Elder Prescription Insurance Coverage (EPIC).

State Bar of Michigan. Elder Law and Advocacy Section. Basic Resources for the Elder Law Practitioner

<http://www.michbar.org/elderlaw/resources.cfm>

Provides contact information for Michigan Area Agency of Aging offices as well as other aging related agencies. Lists a selection of recommended books for elder law attorneys.

National Center on Elder Abuse

<http://www.ncea.aoa.gov/>

The National Center on Elder Abuse (NCEA) is a national resource for elder rights, law enforcement and legal professionals, public policy leaders, researchers, and the public. Contains information such as elder abuse statistics & research, laws related to elder abuse, analysis of state laws. Also includes a descriptive index to the holdings of the National Training Library for Adult Protective Services and Elder Abuse. Many items of this National Training Library are available for loan or purchase.

Pension Benefit Guaranty Corporation

<http://www.pbgc.gov/>

PBGC is a federal corporation created by the Employee Retirement Income Security Act of 1974. The web site offers researchers descriptions of corporate pension plans, access to statutes, regulations, PBGC opinion letters, and other useful information.

Senior Citizens Resources

<http://www.usa.gov/Topics/Seniors.shtml>

Contains a wealth of information for seniors as well as researchers. Some of the topics covered are Federal and state agencies for seniors, end-of-life issues, laws and regulations concerning seniors, aging statistics, eldercare locator, etc.

Social Security Administration

<http://www.ssa.gov/>

Official web site of the United States Social Security Administration. The web site includes information on benefits, the application process, hearings, forms, information for attorneys & representatives, and other topics.

United States Department of Veterans Affairs

<http://www.va.gov/>

Official web site of the United States Department of Veterans Affairs. It includes the Board of Veterans' Appeals decisions from 1992 to present. There are also links to federal legislation and regulations, as well as information about health benefits, compensation, and a variety of other services provided to veterans.



U.S. Senate Special Committee on Aging

<http://aging.senate.gov/>

Provides radio and television clips, committee member commentary as well as transcripts (in PDF file format) of Aging Committee hearings.

