**SHASTA COUNTY COMMISSION ON AGING**

**Minutes for February 18, 2022**

Shasta County Administration Center

Via GoTo Meeting

10:00 AM

**Call to order:** 8:02 am

**Commissioners Present:** Betty Harrison Smith, Kristie Mathews, Bonnie Giles

**Commissioners Absent:** James Berg, Barbara Ghidinelli

**Approve the January 2022 minutes**: no quorum

**Guest Speaker: DeAnne Parker, Elder Law Attorney:** I’ve been in Reding for 22 years. Since 2004 I’ve had my own practice mostly focusing on estate planning and trust and probate administration. Estate planning is planning for our future needs if we become incapacitated or upon our death. We also plan for the management and distribution of our property upon our death. If you don’t plan, you don’t get to make your own key decisions such as who will take care of you with your assets and who is going to make your health care and other personal decisions. If you don’t plan, your family will have to go to court to be appointed conservator over your estate and or your person. In addition, you should have durable power of attorney for property management and an advance health care directive. Must have in place before you lack capacity.

Why estate planning? To protect our assets and ourselves when incapacitated, to transfer our assets on death.

Tools of estate planning:

Will- To govern property upon your death. For people with assets below 166,250.00, governs distributions of assets upon death, does not avoid probate, must be executed according to requirements (vary state by state).

Revokable living trust and a pour over will-

Beneficiary designations: for accounts, who do you want those assets to go to upon death.

Probate: When a deceased person’s assets are over $166,250.00. Can 100% be avoided by having a trust. Probate takes a minimum of 6 months or longer. court appoints person to represent the estate and handle the probate administration. Cost is very expensive.

Revocable living trust: You create the trust, you put your assets in the trust. You are 100% in control of your assets. Allows flexibility and avoids probate.

**Reports from Commissioners:**

**Betty Harrison Smith:** I have signed appointment paperwork from clerk of the board for Bonnie Giles.

Erica Haedrich has stepped down as appointee for District 3.

**Kristie Mathews:** COVID situation-The divide between the vaccinated and non-vaccinated is affecting services provided by a doctor in town if vaccinated but not boosted. It has transferred to Mercy Medical Center also.

**Correspondence**: Jim Berg appointment letter

**Next meeting date:** 3/18/2022 **Adjournment**: 11:03 am