

Taking stock: the importance of a personal inventory

Preparing an estate plan that includes a will or trust and other legal documents is a smart thing to do. Yet even the most exquisitely crafted legal documents have limited practical value during a crisis situation, when others are suddenly having to deal simultaneously with the emotional distress from a serious event and the practical matters of taking hold of the reins of your life. To address this issue, in addition to making legal arrangements, consider taking stock of your life in a personal inventory.

Arguably the most important component of a personal inventory is what's commonly referred to as a "values history." Those who may be responsible for handling these matters will need to know your thoughts and intentions regarding personal care, healthcare and end-of-life matters. You will directly benefit from the informed decisions of your personal agents and medical proxies, so a values history should address at least the following: the identity of friends, family, clergy or



PRO BONO
PUBLICO
MATTHEW LAUREL
TRINIDAD

other people who should be made aware of your condition; matters of personal care or living conditions that you consider to be material to your well-being and comfort; your fears about illness, death and dying; your moral or religious views on medical or life-prolonging care; and the circumstances under which life-prolonging treatment should or should no longer be provided. The personal inventory may also address financial, property and household matters. Once you delve into these matters, you will quickly find that your life is a complex thing and that managing your life, if you are unable, will be an especially challenging undertaking.

The personal inventory should ideally describe the location of sensitive documents such as powers of attorney, life and disability insurance papers, and other information necessary to access and manage your income and financial obligations. Other common items include: online account information, location of sensitive personal property (such as

firearms or cash), post office boxes and safe deposit boxes, safe combinations, identity of CPA and legal counsel, and the location of tax returns and other financial records. Some less obvious items may include: passwords to social media or online service accounts; computer, tablet, mobile phone and voicemail login information; the name and path of important documents stored on your computer; or a description of living things (plants, pets, livestock, crops) that depend on you and how to care for them. Finally, if and to the extent that you own a business, perform a service, or have significant professional responsibilities, your personal inventory might address information necessary to keep the business going and to ensure that operational concerns, financial interests, receivables and potential sources of liability may be easily addressed by someone competent to handle your business affairs.

If you invested in an estate plan prepared by an attorney, you may have been supplied with a personal inventory form to guide you through the process. I include a personal inventory booklet as a courtesy with all of my estate plans. There may be a form or other resource on the

web or at a book store.

Of course, some of the information that may be included in a personal inventory could seriously compromise your interests if someone with unwholesome intentions were to get ahold of it. So if you make a personal inventory, keep it in a safe place, and disclose its location only to trusted people who need to know that it exists.

If you consider it to be too risky to keep a record of certain information in a personal inventory, provide only the essential information for handling your affairs. Otherwise, don't make a written inventory, and simply discuss these matters, thoroughly, with those whom you expect to handle your affairs.

In any event, for your benefit and for the benefit of others, take stock of your life, and equip your loved ones to help you in a time of need.

Matthew Laurel Trinidad is a transactional attorney at Karp Neu Hanlon PC. His practice emphasizes business law, estate planning and probate. Contact him at mlt@mountainlawfirm.com, (970) 945-2261, or visit www.mountainlawfirm.com.

THE BOTTOM LINES | YOUR BUSINESS ANNOUNCEMENTS



DR. PETER ZONAKIS

Dr. Peter Zonakis joins Grand River Health

Dr. Peter Zonakis, M.D., F.A.C.S., has joined Grand River Health in Rifle. Zonakis is an Otolaryngologist, specializing in ear, nose, and throat care and surgery.

Zonakis received his medical degree in 1975 from Indiana University School of Medicine in Indianapolis, Ind. He later completed his otolaryngology residency at Wayne State University School of Medicine in Detroit in 1980. Most recently Zonakis practiced at Payson Regional Medical Center in Payson, Ariz., where he also served as the chairman of the Surgery Department and was the consulting physician for the Arizona Medical Board for Otolaryngology-Head and Neck Surgery.

Dr. Zonakis and his wife Barb have recently relocated to the Rifle area. In their free time, they enjoy cross country skiing and golf, plus hiking with their two Border Collies, Cody and Zorro.

Dr. Zonakis will begin seeing patients at Grand River Hospital and Medical Center this month. To make an appointment, call 625-1100.

Understanding Business Financials and Taxes

The Roaring Fork Business Resource Center has once again joined efforts with

Colorado Mountain College and the Colorado Small Business Development Center (SBDC) Network to present an informative business seminar series.

The final seminar, Understanding Business Financials and Taxes, will be held from 9 a.m. until 1 p.m. Thursday, April 11, at Colorado Mountain College's Glenwood Center at 1402 Blake Ave. Cost is \$35. For a full description, visit www.rfbrc.org. Advanced registration is recommended and is available by calling the CMC Glenwood Center at 970-945-7486.

Beyond Colorado: How to Bring Your Products and Services to the Global Marketplace

Colorado set records in 2012, as manufactured, agricultural and mineral exports grew 11.3 percent. Find out how you and your business can take advantage of this trend at Beyond Colorado: How to Bring Your Products and Services to the Global Marketplace from 10-11:30 a.m. Wednesday, April 10, at Colorado Mountain College Glenwood Center, 1402 Blake Ave. Whether you're an entrepreneur or a small or medium-sized business owner, you may have an opportunity to grow your consumer base outside of the U.S. Presented by the Office of U.S. Senator Michael Bennet, CMC, RFBRC, RREDC, SBDC, Vail Valley Partnership, and the Colorado Bar Association Intellectual Property Section. Attendance is free, but advance registration is required.

Valley View honors Delaney family legacy, celebrates expansion of care for Parkinson's disease

More than 100 members of the Hospitals Founding Families attended a Then & Now event to celebrate the Delaney family's remarkable legacy with Valley View Hospital and learn about the hospital's expanded treatment options for those with Parkinson's disease and other movement disorders.

Valley View was originally built in 1955 through a federal post-war program to bring medical services to rural communities. The townspeople organized a campaign to raise \$340,000 that was matched by a federal grant. In this way, the commu-



Contributed Photo

Alexandra Yajko, major gifts officer for the Valley View Hospital, presents Mary Noone, a local landscape artist who underwent the DBS procedure, with flowers.

nity worked together to provide residents with a nonprofit community hospital. The Valley View Hospital Foundation celebrates the work and legacy of these families through this "Founding Families" group.

Robert and Connie Delaney were leaders not only in this original campaign to build the Hospital but gave their time, talent and resources to support the Hospital's growth over the years. Daughter Diane Delaney shared about her parents, "Back in the day, it was thought to be a duty that my parents participate in the efforts to build and improve the community. It is a very honorable foundation shared by many, a tradition which the Hospital and Foundation seek to continue to honor." The reception celebrated this remarkable legacy but also spoke of the family's personal journey with Parkinson's Disease. Parkinson's Disease is one of numerous Movement Disorders, nervous system (neurological) conditions that cause a person to have abnormal voluntary or involuntary movements, or slow, reduced movements. Parkinson's Disease is probably the best known movement disorder however others include ataxia, essential tremor and dystonia.

Local landscape artist Mary Noone

shared that "Parkinson's Disease is a study in frustration - of your movement, your communications" and that those with Parkinson's Disease "long for an effective treatment." Indeed, Noone traveled to a front range hospital to have Deep Brain Stimulation (DBS). DBS is a surgical treatment option for those patients with particular movement disorders, including Parkinson's. Noone noted, that "it is a joyous thing to have your life back," after undergoing DBS.

Dr. Claudio Feler, a neurosurgeon with Valley View Hospital, began conducting DBS procedures at Valley View in the summer of 2012. Dr. Feler is nationally recognized for his work in the field of movement disorders. He has performed over 300 DBS and related procedures since 1985. As part of the evening's program, Dr. Feler shared that a multidisciplinary team supports each patient through the DBS procedure. This approach, Dr. Feler noted, "dynamically reflects the mission of Valley View: to be the leader for excellence in personalized care and healing."

For more information about the Foundation or to support this endeavor call 970-384-6620 or visit www.vvhfoundation.org.