

# Chambliss Estate Planning Newsletter – January 2024

## Section 1.01      Safeguarding Your Loved Ones: Top Five Measures to Protect Against Elder Fraud and Abuse

By: [Rebecca Miller](#)

As our loved ones age, it is crucial to ensure their safety and well-being, especially in the face of potential threats like elder fraud. Protecting older family members from financial exploitation requires proactive measures and a keen awareness of potential risks. Here are the top five things you can do to safeguard your loved ones.

### **Educate Them About Common Scams**

Knowledge is the first line of defense against elder fraud. Take the time to educate your loved ones about common scams targeting seniors, such as phishing or imposter emails, fake websites, fraudulent phone calls, romance scams, and social security scams. Make them aware of the tactics scammers use to gain their trust and access to their finances. Remind them to be wary if asked for personal information like social security numbers and bank or credit card information, and to never send money or gift cards to anyone they meet online. Encourage open communication so they feel comfortable discussing any suspicious encounters.

### **Establish Power of Attorney and Health Care Directives**

Work with your loved ones to establish power of attorney and health care directives while they are still capable of making informed decisions. These legal documents grant authority to trusted individuals to have access to financial and medical information and make decisions on their behalf if they become unable to do so. This ensures that responsible parties are equipped to protect their interests and prevent potential exploitation.

To read the full article, click “Read More” below.

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## Estate Planning Resources

### [Choosing Trustees for Special Needs Trusts: Five Considerations](#)

Choosing the right person to serve as trustee of a special needs trust is a key task when creating such a trust. It may also prove to be one of the most challenging. Trustees are responsible for the following...

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### **[Estate Planning: Should I Divide My Assets Equally?](#)**

Your heirs may not see eye to eye on family circumstances, particularly regarding inheriting your estate. Relationships can change and intensify when you die. Underlying issues can bubble to the surface, creating tensions over your estate and possibly tearing your family apart...

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### **[2024 Standard Protections for Spouses of Medicaid Applicants](#)**

Each fall, the Centers for Medicare & Medicaid Services renews the federal guidelines that seek to protect individuals whose spouses are applying for or receiving Medicaid long-term care benefits...

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## Upcoming Events

### **Just Craftin' Around Art Program**

**Where:** [Hixson Community Center](#) | **When:** Tuesdays, January 9-February 6, 2024

This five-week program for individuals with disabilities ages 13 and up invites you to come relax, socialize, and make some awesome art! Every week there will be a new project that you can take home at the end. Also, each project will include different mediums and can be uniquely decorated to your liking. All supplies and instruction will be provided, so all you need to do is register and show up with a creative attitude! Contact Ella at [eboeke@chattanooga.gov](mailto:eboeke@chattanooga.gov) or call (423) 643-6090.

### **[Sensory-Friendly Concert Presented by the Chattanooga Symphony Orchestra](#)**

**Where:** [Chattanooga Theatre Center](#) | **When:** January 13, 2024

This sensory-friendly concert is free for all ages. The concert will take place in the main lobby of the Chattanooga Theatre Centre. For more information or to RSVP, visit the [event page](#).

### **Chillin' Like Villains UTC Women's Basketball Game**

**Where:** [McKenzie Arena](#) | **When:** January 20, 2024

UTC has generously donated 50 tickets to Chillin' Like Villains for individuals with disabilities and a parent/caregiver! Free tickets are limited on a first come, first served basis. After all tickets are given out, individuals may still join but will need to purchase their own ticket. Please RSVP by January 16 to Jessie at [jmock@chattanooga.gov](mailto:jmock@chattanooga.gov) or call (423) 643-6606.

### **[Special Olympics Young Athletes Program](#)**

**Where:** TBD | **When:** Saturdays, February 3-24, 2024

Special Olympics Young Athletes is a sport and play program for children with intellectual disabilities and their siblings, ages 2 to 7. Young Athletes introduces basic sport skills like running, kicking, and throwing, and offers the chance to share the joy of sports with all children. Contact Ella at [eboeke@chattanooga.gov](mailto:eboeke@chattanooga.gov) or call (423) 643-6090.

### **[Chillin' Like Villains Annual Sweetheart Dance](#)**

**Where:** [Education Building in Chattanooga Zoo](#) | **When:** February 8, 2024 Wear your favorite Valentine's Day

apparel (festive or fancy, whichever you choose) and come ready to dance and eat some yummy food! This event is free. Please RSVP by February 2 to Jessie at [jmock@chattanooga.gov](mailto:jmock@chattanooga.gov) or call (423) 643-6606.

### **Wheelchair Basketball**

**Where:** [Hixson Community Center](#) | **When:** February 10 and March 2, 2024

These monthly pick-up games are designed to encourage skill development, recreational wheelchair basketball play opportunities, and community awareness on a monthly basis. The program is designed for individuals with physical disabilities/mobility impairments along with individuals without disabilities that want to encourage inclusive opportunities. To sign up, contact Elaine at [eadams@chattanooga.gov](mailto:eadams@chattanooga.gov) or (423) 643-6607 or Jerry at [jdhighlighter71@gmail.com](mailto:jdhighlighter71@gmail.com) or (423) 596-5268.

## Also Check Out

### **[Nonprofit Plans to Start New Inclusive Playground at Chattanooga's Riverview Park by June](#)**

The playground will be designed for children using wheelchairs and those with balance issues. Ramps will lead up to the slide and the merry-go-round will be set into the ground so children can easily traverse it if they have mobility issues. It will feature soothing music and supportive swings. The bathrooms will have full-size changing tables. The organization expects to break ground in March 2024 and complete work by the end of June 2024.