

**BELLEVUE NETWORK ON AGING  
MINUTES**

April 6, 2023,  
Virtual – Zoom.

North Bellevue Community Center via

8:30am – 10:30AM

**MEMBERS PRESENT:** Abigail Brown, Beverly Heyden, Diana Thompson, Eleanor Lee, Gazel Tan, Hannah Kimball,, Kira Hackett, Phyllis Smilen, Shana Aucsmith.

**MEMBERS ABSENT:** Shelley Gehring., Anne Rittenhouse, Julie Hart, Barbara Carey,

**STAFF PRESENT:** Dan Lassiter, Bellevue Parks & Community Services  
Jen Newton, Bellevue Parks & Community Services  
Christy Stangland, Bellevue Parks & Community Services

**GUESTS:** Rhonda Patrick

**PRESENTER(S):** Kristin Liliquist Reeder  
PLLC: Elder law and Estate Planning  
Danielle Caldwell: Eastside Legal Assistance Program

**RECORDING SECRETARY:** Daniel Lassiter, Bellevue Parks & Community Services

**WELCOME AND ROLL CALL:** The meeting was called to order by Abigail Brown and the roll call taken.

**PUBLIC COMMENTS:** None

**APPROVAL OF MINUTES:** March 2023 minutes approved.

**PRESENTATION:** Kristin Liliquist Reeder PLLC: Elder law and Estate Planning

Danielle Caldwell: Eastside Legal Assistance Program

Kristen Liliquist Reeder

Today's covered topics

- Power of Attorney for Finances
- Power of Attorney for Health
- Living Will/Health Care Directive
- Community Property Agreement (if married and if appropriate check with attorney)
- Will and/or Living Trust

” Every person has an estate. We all procrastinate in setting up a plan for that estate. The number one important detail in estate planning is not having a last will and testimony, which is good, but the number one need is to legally name a Power of Attorney for anyone over the age of 18. A Power of Attorney is a legal document that allows someone else to act on your behalf while you are alive and not able to act for yourself. You can have a separate document for both financial and health care situations to ensure the right people are assigned to manage these very different matters. You need to have someone who can legally speak for you. Do not assume because you are close to a person that they are allowed to speak for you.”

Financial Power of Attorney checklist: 1) Do I have an original copy? 2) “Durable”? 3) Effectiveness. 4) Agent Powers. 5) Gifting 6) Access financial accounts 7) Revoke Community 8) Property Agreement 9) Beneficiary Designations 10) Ability to work with estate attorney 11) Do I have an alternate Agent? 12) Provision for guardian of minor children? 13) Does the agent know the location of the POA?

While a person is alive, a Living Will is an important legal document to have. Once a person dies, a Living Will is no longer effective.

The Living Will allows you to specify your wishes regarding end-of-life decisions, and also directs health care professionals and your family to follow your wishes.

Kristen presented the need for Power of attorney and their types, estate planning, wills, including language that needs to be part of these documents.

Do I have and know where the original copy is? Accurately reflects my last wishes. My doctor and/or the Health Maintenance Organization has a copy?

A Last Will and Testament is a legal document detailing how you would like your money to be distributed at the time of your death. You also will name the person or agency who you trust to manage your final affairs (Personal Representative) Wills can contain tax-saving provisions if necessary. Wills can contain trusts for minors or disabled persons if necessary.

Kristen mentioned interesting bits of information including different banks that your home loan may be from and how they have a clause in their contract that takes all your assets in their bank at the time of death to pay toward your mortgage.

## Trusts

A Revocable Living Trust is a legal document that can act much like a will. It dictates who you want to manage your affairs (Trustee) and where your money should go at your death. Certain assets have to be transferred into the Trust in order for it to be effective (e.g., residence is deeded into the Trust). Trusts are generally more expensive to set up than wills. Trusts are private and not filed with the court. Trusts can help to avoid probate.

## Probate

Court administered process where a person is named by the Superior Court to legally administer a decedent's affairs. Persons dying with a Will: estate is managed as a "probate." Persons dying without a Will: estate is managed as an "administration." Washington State has a stream-lined probate process, unlike other states (e.g., California).

Last wishes: check list for estate planning legal documents. Where is my original copy? My document (will, POA) reflects my last wishes.

Who is my: Personal Representative? Trustee? Agent? How are my minor children cared for? Guardian? Trustee for children's trust?

## Assets

I have an accurate list of the current fair market value of all my assets & debts. Life insurance policies: know cash value and death benefit. Are some assets Joint Tenancy with Right of Survivorship? —" winner" takes all. Do my beneficiary designations coincide with my will/Living Trust? If my estate > \$2,200,000 then I have prepared for possible

Kristen recommends that everyone updates their will about every two years to ensure things are current. Furthermore, Kristen instructed people to ensure their POA knows all their passwords to important bank account numbers, email accounts, estate accounts and tax accounts.

## MONTHLY REPORTS

### **Human Services Report:**

- Human Service Commission finalized ARPA funding recommendations at the meeting on April 4th. They will be presented to the city council in early May.

- Eastside Human Services staff presented at the Eastside Human Services Forum last week. They discussed the following questions then answered questions the audience:

- What are your city's **strategic priorities** or plans for the next 2-4 years to improve health and human services?
  - What **gaps are you experiencing in providing services** to your communities?
  - Where does your city see **opportunities for collaboration and partnership** with service providers and community-based organizations? What opportunities for funding are on the horizon?
  - What is your city doing to make **funding** more accessible and less restrictive? What does city staff look for in applications/RFPs?
- Notes from the event will be sent out and I can forward them to anyone that is interested.

**COMMITTEE REPORTS:** *Members were asked to read the following committee reports before the meeting for discussion.*

**ADVOCACY COMMITTEE REPORT:**

Diana reported bills that seem to be passing in the legislature. Currently personal needs allowance is passing, as is Death with Dignity updated legislation and coverage of a higher cost on hearing aides is doing well.

Eleanor reported being at the senior day of Washing Dementia Group.

**OUTREACH & EDUCATION COMMITTEE:**

Gazel reported on the Crossroads and the Bellevue Farmers Markets. They will begin in June. Help is needed from all members of BNOA to tend the BNOA table of information. Senior Day at the Market for BFM will likely be in September. Ageis Living will be this year's sponsor. Gazel will pull a meeting together with Liz if BFM to discuss.

Gazel reported that the presentation at St. Louise Forever Young Group in March went well, and they are interested in receiving Neighborhood News monthly.

A group is needed to help work the information table at the May 3<sup>rd</sup> Chinese Information Services Center Health Fair located at North Bellevue Community Center from 10-2 and asked for volunteers.

## **HOUSING AND TRANSPORTATION COMMITTEE:**

The last City of Bellevue 2044 Planning meeting has occurred. Information will be coming. There is a book with all the details that can be ordered. A digital book is available and Gazel will send the link to BNOA members. Abigail indicated to the group that even though the meetings are complete, input will continue to be received.

## **OLD BUSINESS:**

-The Roberts Rules of Order that had been given to each member with possible updates was given a final review and approval. A discussion was had on how detailed the minutes should be of the main meeting. Diana is not in favor of using the committee minutes until they are approved at the next committee meeting. The group discussed not adding the monthly committee minutes to the monthly document but having everyone read the committee minutes and then give three minutes for a report time on each committee. The BNOA generally agreed, and committee minutes will not be posted again after today's meeting. The document adapted document of Robert Rules of Order will be used in future BNOA meetings.

## **NEW BUSINESS:**

-Member Shellie Gehring has resigned from the BNOA.

-Recruitment has interviewed Rhonda Patrick who is considering becoming a BNOA member.

*Meeting adjourned at 10:45am*