

Your Guide to Remote Legal Representation in California

Oct 2, 2026 · @MICHAEL J. YOUNG

You do not need to come to an office

You can complete a full estate plan or Medi-Cal asset protection plan from your own home, anywhere in California. Our meetings happen by phone or video, your documents come to you by email or mail, and a notary handles the signing near you.

This matters most for the people elder law serves. Travel is hard when you are caring for a spouse, recovering from an illness, or living hours from a qualified elder law attorney. Adult children helping a parent often live in another city or state.

I am Michael J. Young, an elder law and estate planning attorney in Walnut Creek with more than 30 years of experience. This guide explains how working with me remotely works, what to expect, and what you need to get started.

How it works, step by step

1. **First conversation.** We talk by phone or video about your family, your assets and what worries you. Family members can join from wherever they are.
2. **Information gathering.** You send the facts I need: names, a list of assets, and copies of any existing trust, will or deeds. Email, mail and phone all work.
3. **Your plan.** I explain my recommendations in plain language and answer your questions before anything is drafted.
4. **Drafts for review.** I email your documents to you. I can also mail printed copies if you prefer paper.
5. **Review meeting.** We go through the documents together by phone or video, and I make any changes.
6. **Signing.** A notary comes to your home, or you visit a notary near you. The next section explains this.
7. **After signing.** I guide you through the follow-up, such as transferring your home and accounts into your trust.

What can be handled remotely

Nearly everything I do for clients can be done without an office visit.

Service	What it does for you
Revocable living trust	Keeps your estate out of probate and names who manages things if you cannot
Medi-Cal asset protection planning	Protects your home and savings from the cost of long-term care
Enhanced financial durable power of attorney	Lets someone you trust act for you, including for Medi-Cal planning
Advance health care directive	Names who makes medical decisions and records your wishes
Crisis planning	Help when a loved one is already in, or about to enter, a nursing home
New probate and trust administration	Guidance for families after a death

How your documents get signed

Your documents are signed in person with a notary, close to where you live. You have two choices:

- **A notary comes to you.** A mobile notary visits your home, or a care facility or hospital if needed.
- **You go to a notary.** You take your documents to a notary near you at a time that suits you.

Before signing day, I send clear instructions that show where each person signs and what the notary needs to see. Bring current government-issued photo identification.

Some documents also need witnesses. I will tell you ahead of time which ones do and who may serve as a witness.

After signing, you keep your originals and send me copies for your file.

What you need

A telephone is enough to get started. Everything else is optional.

- **A phone.** Every meeting can be held by phone if you prefer.
- **Email, if you have it.** Documents arrive faster by email, but I can mail printed copies instead.
- **Video, if you like it.** A smartphone, tablet or computer with a camera lets us meet face to face.
- **A helper, if you want one.** A family member or friend can set up the call and sit in with you.

If you are not comfortable with computers, tell me. We will work by phone and mail.

Your privacy

Working remotely does not change my duty to keep your information confidential. The attorney-client privilege applies to our phone calls, video meetings and emails just as it does in an office.

A few habits protect you on your end:

- Take our calls in a private room where you can speak freely.
- Use your own email account, not one shared with others or provided by an employer.
- Tell me who you want included. Family members join only with your permission, and I may ask to speak with you alone for part of a meeting.

Common questions

Are documents signed this way as valid as ones signed in a law office? Yes. What makes a document valid is how it is signed, witnessed and notarized, not the room it is signed in.

I live far from Walnut Creek. Can you still help me? Yes. I represent clients throughout California.

Can my children take part if they live elsewhere? Yes, with your permission. They can join by phone or video from anywhere.

My parent is in a care facility. Can this still work? Often, yes. A mobile notary can go to the facility. Your parent must be able to understand the documents and make their own decisions.

What if I do not use email or a computer? We work by phone and mail.

Will I ever need to come to your office? No. Remote clients complete the whole process from home.

Your next step

The first step is a conversation. Visit walnutcreekelderlaw.com to request a consultation.

To hear more first, listen to my podcast episode on this topic: [Estate Planning From Home: Work With an Elder Law Attorney Anywhere in California](#).

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Attorney advertising. This guide is general information, not legal advice, and reading it does not create an attorney-client relationship. Every situation is different. Speak with an attorney about your own circumstances.