

# Family Planning & Access to Assets Presentation: ORI Community Conversations

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# Why Plan for all Possibilities

- **Greater control**
- **Greater ease**

Manage bank  
accounts,  
vehicles, other  
assets

Protect children  
from court  
intervention

Identify people to  
be in charge

Identify steps to  
take

# How to Plan for Property and Family

- Immigration lawyers might prepare powers of attorney and caregiver affidavits as part of a representation
- Some organizations and legal aid clinics might provide free assistance
- Each person in Massachusetts can make a plan, even without an attorney's help

# Relevant Documents

- **Manage Assets**
  - **Power of Attorney (best)**
  - **Joint Ownership**
  - **Beneficiary Designations**
- **Manage Care for Family**
  - **Caregiver Affidavits (best)**
  - **Will or nomination of guardian**
  - **Delegation of Parental Authority**

# Manage Assets

- **Power of Attorney**
  - **Ask your bank (for bank accounts)**
  - **Search online for “free Massachusetts power of attorney”**
  - **Print and sign on paper in front of a notary**
  - **Questions?** [¿Qué es un poder legal \(POA\)? | Oficina para la Protección Financiera del Consumidor](#)
- **Joint Ownership**
- **Beneficiary Designations**

Managing accounts and assets personally if detained

Managing accounts and assets personally if deported

Providing for family members who remain in the U.S.

Managing a U.S. business if deported

# Manage Care for Family

- **Caregiver Affidavit**
  - **Simultaneous caregiver**
  - **May obtain benefits for children**
- **Will or Nomination of Guardian**
  - **Must prove death or incapacity**
  - **Requires court action after 30 days**
- **Delegation of Parental Authority**
  - **Must list specific dates**
  - **Limited to 60 days**
- **Letter to airline authorizing travel**
- **School pickup list**

Managing  
care if  
detained

Managing  
care if  
deported

# **Practical Steps to Care for Family**

- **Consider:**
  - **Update school pickup lists**
  - **Obtain passports for all children**
  - **Write instructions for care (medical conditions or medications, any important notes you would give a babysitter)**
  - **Keep important documents safe and easy to find, give copies to people who will be responsible**

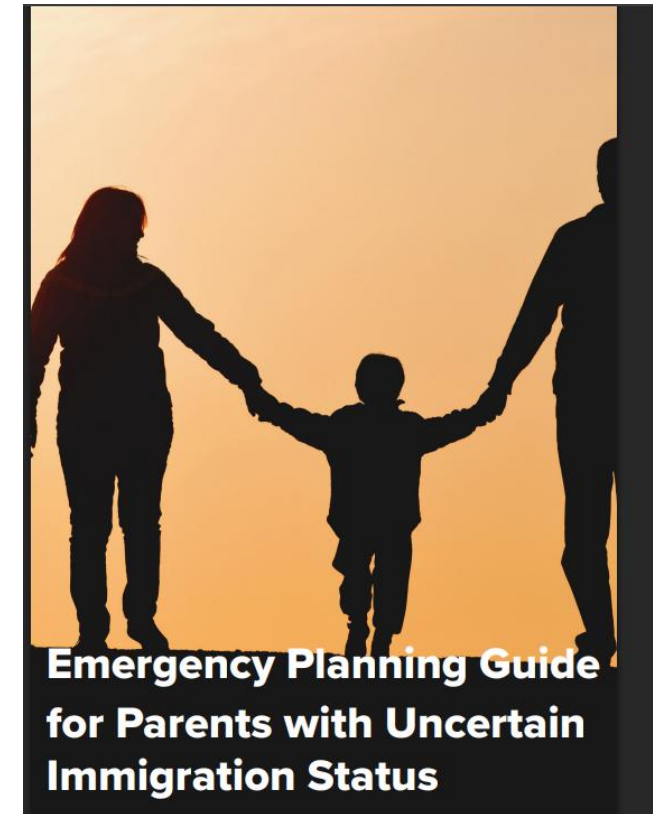
# Family Plan Guides

**AGO's Guide** for those with uncertain immigration status:

[www.mass.gov/emergency-planning-guide-for-families](http://www.mass.gov/emergency-planning-guide-for-families)

**Boston Medical Center Family Plan:**

[www.bmc.org/sites/default/files/Patient\\_Care/Specialty\\_Care/IRHP/family\\_preparedness\\_plan.pdf](http://www.bmc.org/sites/default/files/Patient_Care/Specialty_Care/IRHP/family_preparedness_plan.pdf)





# New Tax on Certain Transfers Overseas

- **Effective January 1, 2026**
- **1% excise tax on certain transfers of money outside the U.S. (“remittance transfers”)**
- **Applicable Law:** 26 USC §§ 4475, 6656; Public Law No. 119-21, 139 Stat. 72 § 70604 (July 4, 2025, commonly known as OBBBA)
- **Does not apply to:**
  - **Transfers made through U.S. accredited banks**
  - **Payments through U.S. debit cards and credit cards**
  - **Transfers of cryptocurrency**
- **Money transfer companies collect and pay the tax**





