

WILLS CHECKLIST

ITEMS TO BRING

If you have any of the following documents, please bring them to your consultation (originals or photocopies).

- Powers of Attorney
- Trust Agreements
- Corporate Documents
- Deeds
- Wills or Codicils
- Pre or Post Nuptial Agreements
- Long-Term Care Insurance Policies
- Gas and/or Oil Leases

QUESTIONS TO CONSIDER

The decisions you make in your legal documents can be some of the most important decisions you make in your life. After all, these choices will impact you and your family and sometimes even future generations. We recommend that our clients give some thought to the following questions before you arrive at your consultation.

- If you were unable to make your own medical and/or healthcare decisions for yourself, whom would you like to make those decisions as your agent in your **HEALTHCARE POWER OF ATTORNEY**? If that individual were not available, whom would you choose as a backup?
- If you were unable to manage your own personal and financial affairs, whom would you want to serve as your agent in your **FINANCIAL POWER OF ATTORNEY**? If that individual were not available, whom would you choose as a backup?
- If you decide to establish a **TRUST** to protect your home and assets, whom would you want to serve as **TRUSTEE**? In addition to your family or friends, a professional trustee (such as a bank trust department) can be a very good choice.
- Who would you want to probate your estate and act as an **EXECUTOR** when you pass away? If that individual were not available, whom would you choose as a backup?
- If you have minor children, whom would you want to serve as a **GUARDIAN** should you pass away before your children reach age 18? If that individual were not available, whom would you choose as a backup?
- If you would like to give to a **CHARITY**, either during your lifetime or after you have passed away, what charity (or charities) would you like to consider?