

Step 6: Review and Modify

After considering the alternatives, which of these actions do you need to do?

- _____ Obtain permission of people I would like to name to represent me in these (estate planning) documents.
- _____ Have my will and/or trust drafted or updated.
- _____ Carefully read each legal document.
- _____ Make a list describing whom I want to receive each of my personal belongings and put it with my will.
- _____ Explain to family members that I have a will and tell them its location as well as the location of other important documents.
- _____ Give a copy of my will to my executor or personal representative.
- _____ Give a copy of my trust to my trustee.
- _____ Give a copy of my living will to my attorney, doctor, hospital, and family.
- _____ Have a current durable power of attorney for health care and family.
- _____ Give a copy of my durable power of attorney for health care to my attorney, doctor, hospital, and family.
- _____ Have a current durable power of attorney for financial affairs.
- _____ Give a copy of my durable power of attorney for financial affairs to my attorney and all appropriate financial institutions.
- _____ Write a letter of farewell to your spouse, children, and other close family members or friends.

** Financial Checkup Checklist is from Jerry Mason's book, Financial Fitness for Life, (1999) published by Dearborn Publishing Company, page 295.*

Person completing this step:

Date completed:
