

Checking my drafts

Tick each one when you have checked it.

1. Is every name spelled right?

In your summary: "Your Documents" and "Who Is in Charge."

- ☐ Mine ☐ My children, if any
- ☐ Every person I named

2. Is the right person in charge, at the right time?

In your summary: "Who Is in Charge" and "If You Cannot Manage Your Affairs."

Write who your draft names. Is it who you want?

- | | | | |
|---|-------|-------------------|-------|
| ☐ Who takes over my trust | _____ | Backups, in order | _____ |
| ☐ Personal representative | _____ | Backups, in order | _____ |
| ☐ Agent, in my power of attorney | _____ | Backups, in order | _____ |
| ☐ Health care agent | _____ | Backups, in order | _____ |

3. Do the right people get the right things, at the right time?

In your summary: the sections that start with "When," then "Beneficiary Trusts" and "Backup and Young Beneficiaries."

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|--|--|
| ☐ Who gets it | ☐ Each share is the size I want |
| ☐ When they get it | ☐ What the one still living keeps, for a couple |
| ☐ If someone I named dies before me | ☐ Certain things for certain people |

Shares I want

4. Are my health care wishes there?

In your summary: "Your Health Care Choices."

- ☐ My health care agents ☐ My wishes

Changes I want, or questions I have

Then reply to the email that brought your drafts

If everything is right

"Everything looks right. Please send my final documents."

If something needs to change, say what. For example

"Please change my backup trustee from my son to my daughter."

If you have a question, ask it. A question costs nothing either.