

Step 2 · Signing Instructions

Sign your documents

Who must be in the room



Find 1 notary and 2 witnesses. All 3 must be in the room with you while you sign. **The notary cannot be one of your 2 witnesses. You need 3 people.**

Before signing day

Stop Do not sign, initial, or date anything yet.

- ☐ Print **every page** of your final documents.
- ☐ Decide what you will initial. Use the **Power of Attorney guide** and the **Health Care Directive guide**.

Where to find a notary

- Your bank, a UPS Store, or a notary who comes to your home.
- ☐ **Call first.** Some banks will not notarize wills, so ask.

Say

"I have estate planning documents to sign. I am bringing 2 witnesses."

Who can be a witness

A witness must be an adult, age 18 or older, who **gets nothing from your plan**. The same 2 witnesses can sign everything.

Good picks: ☒ A neighbor ☒ A friend ☒ A coworker

These people cannot be a witness

- ☒ You or your spouse.
- ☒ Anyone named in your documents. That means your trustees, your agents, your executor, and all of their backups.
- ☒ Anyone who gets anything from your trust or your will.
- ☒ The husband or wife of any of those people.
- ☒ The notary.
- ☒ Anyone who gives you medical care, like your doctor or nurse.

In a hospital or care home? Only 1 of your 2 witnesses may work there.

What to bring

- ☐ A **photo ID** for you. A driver's license or passport works.
- ☐ A **blue or black pen**.
- ☐ The **name of the county** you are signing in.
- ☐ All of your documents, **not signed**.
- ☐ **This page**.
- ☐ A **photo ID for each witness**. Each witness also needs to know their **address, phone number, and email**.

I own an LLC or a business. We write the papers that move your part of the LLC into your trust. You sign them with your other documents. Keep the signed papers with your LLC records.

Rules for signing day

- 1 Sign your name **the way it is printed** under the line.
- 2 Sign **only while your witnesses and the notary are watching**.
- 3 Initial **only the lines you chose**. Leave every other initial line empty.
- 4 Leave the line "This document prepared by" **empty**.
- 5 **Do not cross anything out**. Do not write in the margins.

Stop

Made a mistake? Stop. Do not fix it. Reply to our email and we will tell you what to do.

The date of your trust

Your trust has a blank line for its date. **Write the day you sign.** Some other documents ask for "the date of your trust." Write that same date every time.

Write it down

The date of my trust _____

The county I am signing in _____ My notary _____

Witness 1 _____ Witness 2 _____

Married? Each of you has your own will, power of attorney, health care directive, and HIPAA form. Finish one person's, then the other's.

Sign in this order

A pen mark means that person signs. Tick each document when it is done.

Document	 You	 Witness 1	 Witness 2	 The notary
☐ 1 Your Trust You: Sign every line with your name under it. Witnesses: Both sign.				
☐ 2 Certification of Trust The short paper that proves your trust is real. You: Sign and date.				
☐ 3 Your Will You: Sign the will. Then sign the next page, called the Self-Proving Affidavit. Witnesses: Both sign the will and print their names and addresses. Both sign the affidavit.				
☐ 4 Your Deed Only if a house or land goes into your trust. You: Each owner signs. Witnesses: 1 witness signs beside each owner.				
☐ 5 Your Power of Attorney You: Initial the lines you chose. Sign and date. Witnesses: 1 witness signs and prints their name, address, phone, and email.				
☐ 6 Your Health Care Directive You: Initial the lines you chose. Sign and date. Witnesses: Both sign, date, and print their names and addresses. The notary: Nothing. No notary on this one.				
☐ 7 Your HIPAA form You: Sign and date.				