



SAFEKEEPING OF ESTATE PLANNING DOCUMENTS

Financial Power of Attorney

- ❖ You have executed 2 originals, which are in this folder. I will retain only a scanned photocopy.
- ❖ I recommend that you present one original to each institution where you have an account. Ask them to add the “POA” designation to your account title. They will likely want to see an original POA but they should make a photocopy for their records and return the original to you.
- ❖ You may, but don’t have to, share a copy of the POA with your agents. If you choose not to share a copy, you should at least let them know that they have been named as your agent and where they can find the original POAs should something happen to you.

Advanced Medical Directive

- ❖ You have executed 2 originals, which are in this folder. I will retain only a scanned photocopy.
- ❖ It is advisable to give a copy to your doctors so that they are aware of who your health care agents are. Ask your doctor about a MOLST form, which will translate your wishes from an advance directive into the form of a medical order in your chart. They will likely want to see an original directive but they should make a photocopy for their records and return the original to you.
- ❖ You may, but don’t have to, share a copy of the advance directive with your agents. If you choose not to share a copy, you should at least let them know that they have been named as your agent and where they can find the original document should something happen to you.

Last Will and Testament

- ❖ You only have 1 original Last Will and Testament. If you have chosen to keep the only original, you should store it in a fireproof safe in your home. If you do not have a fireproof safe, you should keep your Will with your other important papers. Do not store your Will in your safe deposit box unless all personal representatives named in your Will are also joint owners on your safe deposit box—otherwise, they will not have access to the box upon your death.
- ❖ If you have chosen to file your will with Register of Wills in the county in which you reside for safekeeping, I will return to you a photocopy of your Will to keep in this folder with your other estate planning documents. I will also return to you the receipt from the Register’s office confirming that your Will has been filed for safekeeping. You should keep the receipt with the photocopy of your Will so that your personal representative will know where to find the original.