

**Document Decision Checklist
SINGLE PERSON**

For all names, please include the person's middle initial and any other name by which they may be known.

For all addresses, please include both street address and mailing address, if different.

For all phone numbers, please include home, cell and work

Full name:

Are you known by any other names?

Address:

County:

Phone Numbers: (Home)

(Work)

(Cell)

Date of Birth:

Social Security Number:

In which state do you legally reside?

Health Care Proxy:

1. Name, address and phone numbers of person appointed as health care agent. Person who can make health care decisions for you when you are unable to make your own decisions:
(Please include full name, address and phone numbers, including cell numbers.)

2. Alternate health care agent:
Name, address and phone number of alternate appointed as health care agent

Will:

1. Executor/trix/tors:
(include town/city and state of residence)

2. Successor Executor/trix/tors:
(include town/city and state of residence)

3. Guardians for minor children if any:
(include town/city and state of residence)

4. Successor guardians:
(include town/city and state of residence)

Durable Power of Attorney (financial decisions):

1. Name of person who may act for you (financially) in the case you become incapacitated:
(include city/town and state of residence).

2. Alternate Attorney-in-Fact

3. Persons who may receive gifts made by your Attorney-in-Fact – check all that apply:

 Spouse
 Children
 Issue
 Siblings

___ Issue of siblings
___ Others – including charitable organizations - Please name:

Living Will (optional):

1. In the case where there is no **reasonable expectation of your recovery** and you cannot speak for yourself, this document expresses your wishes as to whether you want to be **kept alive by artificial means** at all costs **or** that you be **allowed to die a dignified death** and not be kept alive by artificial measures:

2. Direction to allow organ donation or no such direction: **yes or no**

Real Estate

If possible, please provide a copy of the deeds to all real estate, including timeshare deeds, which show either the book and page where the deeds are recorded or the certificate of title for Land Court properties.
Addresses:

Revocable Trust (Please include town/city and state of residence for each person):

Revocable Trusts can be amended by the Settlor. Assets, which are titled in the revocable trust, avoid probate and are available to the family immediately upon the death of the Settlor. For estate tax planning trusts, at the death of the Settlor, (the person who creates the trust), an unlimited amount is free of Federal Estate Tax for deaths occurring in the year 2010 and under current law, this amount is set to drop to \$1,000,000 for all deaths occurring after the year 2010.

1. Trustee(s):
(The Settlor, the person who creates the trust, may be the sole Trustee or may be a Co-Trustee with another person. The Settlor can remove any named Co-Trustee at any time. **Please include full name and town and state of residence for each person.**)

2. Successor Trustee(s), in the event the Settlor cannot act for him/herself:
(include town/city and state of residence)

3. Administrative Trustee upon death of Settlor: (Charged with administering the trust and estate prior to distribution to beneficiaries.)

4. Trustee(s) for shares held for specific beneficiaries (include name of each beneficiary): (Recommend that each beneficiary receive his/her own trust share versus an outright distribution – reason: the beneficiary will enjoy creditor protection for all of his/her trust assets and yet still have access to the assets and will enjoy estate tax protection – the assets can be sheltered from estate tax in the beneficiary’s estate.) Usually the beneficiary is a Trustee of his/her share and appoints his/her Co-Trustee.

5. **Special Power of Appointment:**

A beneficiary may be given the power to change the distribution of his/her share upon the beneficiary’s death (called a special power of appointment). This power of appointment gives flexibility to the beneficiary to make limited changes to how his/her trust share will be distributed upon the beneficiary’s death. The special power allows the beneficiary to change who will receive a trust benefit and/or how other beneficiaries will receive assets from the trust (outright or in a continuing trust). (For example, if a beneficiary’s child was being sued, the beneficiary could change the distribution of his/her share from an outright distribution to that child (subject to the lawsuit) to a distribution held in trust for that child’s benefit (not subject to the lawsuit) or re-allocate assets among beneficiaries). Should the beneficiaries be given a special power of appointment? This power is recommended to allow flexibility in dealing with future circumstances that cannot be predicted today.

