

WILL, LIVING WILL, HEALTHCARE POWER OF ATTORNEY

INSTRUCTIONS:

- The interview sheet contains basic information needed for your will, living will, and healthcare power of attorney. Do the best to complete the information.
- If you do not know the answer, then write "I do not know"
- E-mail or print page and complete requested information.
- After the interview sheet is complete, schedule appointment and bring the sheet with you.
- If you would like us to have your documents ready for your first appointment, fax interview sheet to (616) 454-0420

ESTATE PLANNING PACKAGE WITH MINOR CHILDREN

The estate planning package includes a simple will, healthcare power of attorney, and living will.

A will is a document which states your intentions after your death. It will typically contain a number of provisions which include distribution property, payment of debts, the name of a personal representative, and the type of probate (supervised or unsupervised).

If a person dies without having prepared a will, than a person's assets will be distributed to his beneficiaries pursuant to the intestate probate code and *not necessarily what you want*. The probate code provides for distribution of a person's estate based on how close in affinity his relatives are to him (wife, children, grandchildren, brothers and sisters, and then the parents of the deceased).

A probate court judge supervises the payment of bills and distribution property to assure that the distribution by the personal representative is pursuant to the will or the intestate statute.

Every Michigan probate court will keep a person's will in the court's vault for small fee. This is called safekeeping. It is done by giving your original will to the probate court clerk. If you want to change your will, you can go to probate court and remove your will from the court's safekeeping (you must show proper picture ID).

A **healthcare power of attorney** is a document which gives authority to relative or friend to make healthcare decisions for you in the event that you are unable to make those decisions. A number of medical facilities require a healthcare power of attorney before performing any procedures.

A **living will** is a document which states a your intentions not to be placed on life support systems if there is no likelihood that you will never lead a functional life in the

future. A number of medical facilities require a living will before performing any procedures.

INFORMATION ABOUT YOU

Name: _____

Address, City, State, Zip: _____

County of Residence: _____

E-mail: _____

Driver's License: _____

Social Security Number: _____

Home Phone: _____

Work Phone: _____

Cell Phone: _____

Emergency Contact (name, address, and phone): _____

Employer's Name and Address: _____

Occupation: _____

DISTRIBUTION OF PROPERTY

INSTRUCTIONS: A will determines how your property will be distributed upon your death. Your retirement accounts (401(k) IRA, etc.) will go to the person or persons that you have designated on your beneficiary form with the company that manages your account. Additionally, life insurance proceeds will go to the person or persons that you list as beneficiary on the insurance policy. **Not your will!** It is extremely important that you review your retirement accounts and life insurance beneficiary designation to ensure you have the right people listed. Do not list your estate as the beneficiary.

Your first beneficiary is the person or persons that will receive your property in the event of your death. If you list more than one person then they will receive equal shares.

Typically, people list their spouse as first beneficiary and child or another relative as alternate. If you do not have a relative or friend to designate, you can designate a charity.

Who is your first beneficiary (*can be more than one*)?

How is your first beneficiary known to you (*i.e. husband, wife, children, friend*):

Who is your second beneficiary, if the first dies before you do (*can be more than one*):

How is your second beneficiary known to you (*i.e. husband, wife, children, friend*):

PERSONAL REPRESENTATIVE:

A personal representative will collect your property for distribution and pay your last bills and file your last tax return. You need to list a primary and alternate person to do this. It is usually the spouse or a relative that you trust.

Who is your first choice for your personal representative?

What is their full address?

Who is your second choice for personal representative?

What is their full address?

GUARDIAN AND CONSERVATOR (SKIP IF YOU HAVE NO CHILDREN):

A guardian is the person who will care for your children in the event of your death. A conservator is the person who manages and distributes your child's money (i.e. inheritance). They are usually the same person. You need to list a primary and alternate person. It is usually the spouse or a relative that you trust.

List the name and birth date of all of your minor children:

Who is your first choice for your guardian and conservator?

What is their full address and phone number?

Who is your second choice for your guardian and conservator?

What is their full address and phone number?

INFORMATION ABOUT YOUR PATIENT ADVOCATE

The patient Advocate is the person that will be making healthcare decisions for you in the event that you cannot make the decisions for yourself. Additionally, you should designate an alternate in the event the first person is unavailable or unable to serve.

PATIENT ADVOCATE:

Name: _____

Address: _____

Phone: _____

E-Mail: _____

ALTERNATE PATIENT ADVOCATE:

Name: _____

Address: _____

Phone: _____

E-Mail: _____

FINAL INSTRUCTIONS:

After you have completed the interview sheet, print it out and call for an appointment 616-459-6636.