

WILL: A legal document that allows you to identify your beneficiaries, nominate a legal guardian for any minor children, and dictate how your property will be distributed after you die.

Executor: (Person appointed by you to carry out the terms of the Will)

Executor's Full Legal Name: _____

Alternate's Full Legal Name: _____

Any special circumstances you would like the attorney to be aware of? _____

Any beneficiary that is disabled or receiving government benefits? _____

If you have minor children:

Guardian Full Legal Name: _____

Alternate Guardian Full Legal Name: _____

Trustee Full Legal Name: _____

Alternate Trustee Full Legal Name: _____

Age you wish trust established for minor children to be disbursed fully to children: 18 21 25 Other: _____

GENERAL POWER OF ATTORNEY: Used to make plans for the care of your finances, property, and investments in the event that you can no longer handle your financial affairs yourself. The Durable Power of Attorney: Health Care and Finances.

Agent's Full Legal Name _____

Agent's Legal Mailing Address: _____

Alternate Agent's Full Legal Name _____

MEDICAL POWER OF ATTORNEY: Gives someone else the right to make decisions about their medical care on their behalf.

Agent's Full Legal Name _____

Agent's Legal Mailing Address: _____

Agent's Phone Number _____

Alternate Agent's Full Legal Name _____

Alternate Agent's Legal Mailing Address: _____

Alternate Agent's Phone Number _____

TEXAS HIPAA RELEASE: Provides patients with access to their personal health records. The HIPAA form also allows healthcare providers to share records, with the form specifying when the information can be shared and what it can be used for. The HIPAA release form can be revoked at any time.

Agent's Full Legal Name _____

Agent's Legal Mailing Address: _____

Agent's Phone Number _____

Alternate Agent's Full Legal Name _____

Alternate Agent's Legal Mailing Address: _____

Alternate Agent's Phone Number _____

DECLARATION OF GUARDIANSHIP: A legal document that indicates your preference to the court regarding who you want to serve as guardian if there is ever a guardianship proceeding for you.

Agent's Full Legal Name _____

Alternate Agent's Full Legal Name _____

DIRECTIVE TO PHYSICIANS: Legal form that communicates your wishes about medical treatment at some time in the future, but only if your condition is irreversible or terminal. It speaks for you when you cannot speak for yourself. (Life Support/No Life Support OR When to turn off Life Support)

****You chose your choices when signing document****

Agent's Full Legal Name _____

Alternate Agent's Full Legal Name _____

TRANSFER ON DEATH DEED: Lets you keep all ownership rights to the property during your lifetime, so you can sell it, or use it as collateral on a loan. The Transfer on Death Deed takes effect upon your death, so the property never becomes part of your estate.

Make sure all bank accounts, IRA's, etc. have a beneficiary listed on the account itself at the bank, etc.