

NEW YEAR'S RESOLUTION—
GET MY ESTATE IN ORDER!

LEGAL DOCUMENT CHECK UP:

1. Have I made my wants as to the distribution of my assets clear and enforceable?
(Last Will & Testament or Trust)
2. Have I titled my assets in order to coordinate with the directives in my Will and/or to take advantage of Survivorship and Transfer on Death titles to ease property transfers after death if appropriate? **(Deeds, Asset Titles)**
3. Have I designated an agent to handle my legal affairs when needed and particularly if I become incompetent? **(Durable General Power of Attorney)**
4. Have I received an authorization to handle the legal affairs of any adult children whom I still support or other adult family members/parents whom I am assisting?
(Durable General Power of Attorney)
5. Have I made my desires as to medical care clear and enforceable?
(Durable Power of Attorney for Health Care and Living Will)
6. Have I reviewed my documents lately to determine if a change of circumstance or change in the law might have necessitated a revision or updates? Do I know where my original documents are located? Are my documents stored securely and have I provided information about their existence to the appropriate other parties?

*Let us know if these or any other legal questions are on your mind!
Call us anytime for an Estate Check Up!*

*Susan Priest Richlak, Esquire
Law Offices of Susan Priest Richlak
9140 Tyler Boulevard
Mentor, Ohio 44060
440-255-4838*

ESTATE PLANNING LEGAL DOCUMENT

CHECK UP CHECKLIST:

1. Have I made my wants as to the distribution of my assets clear and enforceable?
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4. Have I received an authorization to handle the legal affairs of any adult children whom I still support or other adult family members whom I am assisting?
(Durable General Power of Attorney)
5. Have I made my desires as to medical care and end of life treatment clear and enforceable? **(Durable Power of Attorney for Health Care and Living Will)**
6. Have I reviewed my documents lately to determine if a change of circumstance or change in the law might have necessitated a revision or updates? Do I know where my original documents are located? Are my documents stored securely and have I provided information about their existence to the appropriate other parties?

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