Taking it to your lawyer

A preparation guide from JustIncase — a warm, unhurried map, just in case. Pina coladas strongly encouraged; no gloom required.

This guide gathers everything a lawyer usually needs to draft or update your legal documents — your will, powers of attorney, healthcare proxy and any trusts. Fill it in, make copies, and take it with you. It asks for **names, institutions and places** only: never write down passwords, PINs or account numbers.

Your name _____ **Date** _____

State / country _____ **Lawyer** _____

1. The people who will act on your behalf

These are the roles your lawyer will put into your documents. Name a first choice and, where possible, a backup for each — life happens, and a backup keeps the map usable.

Executor / personal representative

Settles your estate: gathers assets, pays debts, carries out your will.

Name: _____ Backup: _____

Contact (phone or email): _____

Financial power of attorney (agent)

Handles money and property if you can't — can take effect while you're alive.

Name: _____ Backup: _____

Contact (phone or email): _____

Healthcare proxy / medical power of attorney

Makes medical decisions if you can't speak for yourself.

Name: _____ Backup: _____

Contact (phone or email): _____

Guardian for minor children or dependents

Who raises them if both parents can't — and a backup.

Name: _____ Backup: _____

Contact (phone or email): _____

Trustee

Manages anything you place in a trust (you may serve first, with a successor).

Name: _____ Backup:

_____

Contact (phone or email): _____

Digital contact

The person allowed to manage or close online accounts on your behalf.

Name: _____ Backup:

_____

Contact (phone or email): _____

2. What you own

Institution and location names only — your lawyer needs to know what exists and how it's titled, not the account numbers.

Real estate & property — address, and how it is titled (sole, joint, trust, community property)

_____

_____

Bank accounts & credit unions — institution names only

_____

_____

Retirement accounts & pensions — employer plans, IRAs, annuities; note who the named beneficiary is on each

_____

_____

Investments & brokerage accounts

_____

_____

Life insurance — company and named beneficiaries

_____

_____

Vehicles, boats, valuables and collectibles — and where the titles or registration papers are kept

_____

_____

Business or professional practice ownership — partners, buy-sell agreements

_____

_____

Other assets — inheritances expected, foreign property, intellectual property

3. Who receives what

Primary beneficiaries, contingent (backup) beneficiaries, and roughly what share each receives.

Specific gifts — a particular item or sum to a particular person or charity

Anything unusual your lawyer should know — a beneficiary with special needs, someone to exclude, a former spouse on old paperwork

4. What you owe

Institution names only: mortgage, car loans, student loans, credit lines, personal guarantees, and anything co-signed.

5. Healthcare wishes

Your lawyer can prepare an advance directive / living will to sit alongside your healthcare proxy.

Overall approach to end-of-life care you'd want your proxy and doctors to follow (in your own words)

Any religious or cultural guidance that should shape decisions

Where existing directives live (doctor, hospital program, state registry)

6. Wishes that belong in the legal documents

Care of pets — who takes them, and whether to leave money for their care

Funeral or memorial preferences you want recorded in the documents (where your state or country allows it)

_____

_____

Charitable gifts or a legacy you'd like named

_____

_____

7. Documents you already have — bring copies to the meeting

[ ] Existing will or codicil — and where the original is kept

[ ] Prior powers of attorney (financial or medical)

[ ] Advance directive / living will / healthcare proxy

[ ] Trust documents

[ ] Deeds and titles (house, vehicles, burial plot)

[ ] Prenuptial agreement, divorce decree or separation agreement

[ ] Recent statements for the accounts listed in section 2 (names visible, no need for numbers)

[ ] Beneficiary designation forms (retirement, life insurance)

8. Questions to ask your lawyer

[ ] Does my state or country require the will to be witnessed, and can I use a self-proving affidavit?

[ ] Should I have a revocable living trust, or is a will enough for my situation?

[ ] Who should hold my power of attorney, and how broad should it be?

[ ] Do my beneficiary designations override my will? (They usually do — worth confirming.)

[ ] How often should these documents be reviewed, and what life events should trigger an update?

[ ] What should my executor be told, and may they contact you when the time comes?

Everything here is names, institutions and places — never passwords, PINs or account numbers. Laws differ by state and country, so a lawyer in your area should confirm what applies to you. This guide is preparation, not legal advice.