

“A Million Tiny Things...”

Having Necessary Documents

Let's do this cheaply, easily, and quickly!

- 1) Anyone 18 years of age and older MUST have:
 - A) ADM, Advanced Medical Directive, also known as a living will.
 - B) P.O.A., Power of Attorney, takes care of all paperwork and financial details.
 - C) Will, aka Last Will and Testament. If minor children are involved, also a trust for minor children
- 2) Pre-paid legal services, which due to receiving qualified opinions, I am now both a member and associate:
 - www.ReneeNorman.LegalShieldAssociate.com
 - You, your spouse and your dependent children up to age 26 are covered under your membership
 - As of June 2015, the monthly membership fee for a family is \$20
- 3) When using software, go to your bank branch for witnessing, signing and notarizing your documents. It's free!
 - bring your witnesses with you,
 - ask them to please notarize your documents.
 - Some banks do not like to notarize wills, because they do not want to testify if the person was of right mind.
 - So just say you have “documents” to be notarized.
 - UPS stores, some hospitals, and even mobile services provide options for notarizing documents.
- 4) Make copies:
 - 3 signed originals plus 10 copies of your AMD
 - 3 signed originals plus 10 copies of your P.O.A.
 - 1 copy of your will. ONLY the original of your will is valid. If you want to keep a copy to review, that is OK but be careful of the original. It is best to give the original will to your executor in a sealed envelope. Sign over the seal.
- 5) Usage of documents:
 - 1) AMD; always have 1 original and 3 copies with you. Health care professionals will need to see the original, offer them a copy, and generally they will take the copy and verify they saw the original.
 - 2) P.O.A.; always have 1 original and 3 copies with you. You never know when you need these documents. Once again, show the official person the original and offer them a copy. Sometimes they can accept the copy and verify they saw the original.
 - 3) The ORIGINAL Will is ONLY used after death. It will be used immediately by the executor to pay expenses. Please give your executor the original ASAP, or tell them where it is.
- 6) Any after thoughts, such as specific items going to people, A separate piece of paper, “In addition to my will dated _____, I would like my executor to see that...”

PLEASE NOTE: I am NOT a lawyer, this does not take the place of a lawyer's advice.

INFORMATION NEEDED TO PREPARE YOUR DOCUMENTS

- 1) Your full name, address, phone number, and SS# (Social Security number)
This is the only social security number you need.
- 2) Your spouse's full name, address, phone number
- 3) Your AMD guardians' (2), Names, addresses, phone numbers
Can do co-guardians or single, but still need a backup
Consider people with medical experience, who live close by, who are brave, and who WILL carry out YOUR wishes.
- 4) Your P.O.A. (2), names addresses and phone numbers
Can do co-P.O.A's or single, but still need a backup
Consider someone who is great with money and paperwork, who lives close by, who WILL carry out YOUR wishes and be able to make tough decisions on their own.
- 5) Your executor's name, address and telephone numbers
This should be someone you trust to carry out your wishes, deal with and minimize any conflict, who is great with paperwork and finances.
- 6) Beneficiaries names, addresses and phone numbers
- 7) Bequests names, addresses and phone numbers
- 8) Talk to your AMD, POA, and Executors. Make sure the primary person knows 1) you want them to do this, 2) they are willing to do this, and 3) feel as though they are able to do this. Make sure they know what you do and do NOT want. These are very trusted and honored positions to put someone in. Let them know, it is alright to hire experts to help, such as an accountant, lawyer, etc.

Speaking from experience, I am always honored, and take the assignment of responsibility very seriously. This is a gift of trust you are giving others, and it is a gift of trust they are giving you in return.

IMPORTANT NOTE:

Anyone diagnosed with a terminal illness should talk to their doctor about a "DNR", Do Not Resuscitate order. This is a document prepared with your doctor. It is not included in this information because it is not a legal document, only your doctor can address a DNR with you and prepare this document.

P.S. NO ONE needs to know your finances to prepare these documents!

www.AMillionTinyThings.com

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