



### Legal and Practical Estate Attorneys

What matters most to me legally is: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I would like my estate attorney to: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Estate Attorney info:

\_\_\_\_\_  
\_\_\_\_\_

I have a plan in place ☐

You've been named in my Advance Directives as the person I trust to speak for me when I can't.

- My wishes are written and accessible

-What I most want you to remember: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

I trust you because: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_



### Legal and Practical Final Expense & Life Insurance

What I have in place: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

My Insurance Agent:

\_\_\_\_\_  
\_\_\_\_\_

I want to better understand:

- ☐ How payouts work
- ☐ Beneficiary rules
- ☐ Term vs Whole Life
- ☐ Pre-need plans
- ☐ Other: \_\_\_\_\_

I have a plan in place ☐

You are my secondary/alternate decision maker. If my primary POA is unavailable, you're next in line.

- My wishes are written and accessible

-What I most want you to remember: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_

Thank you for being someone I trust. You'll never be asked to guess -- just to speak for me with honesty and care.



### Legal and Practical Power of Attorney

Who I trust to speak for me:

\_\_\_\_\_  
\_\_\_\_\_

They fully understand my wishes:

☐ Fully ☐ Somewhat ☐ Not yet

I still need to:

Name a POA

Update my forms

Talk to my POA about my care

Other: \_\_\_\_\_

I've given them a copy: Y / N

You've been asked to help "close the loop".

This might include:

- Handling mail or accounts

- Communicating with family

- Closing financial details  
or assisting my executor

Thank you!