

THE MCVEY LAW FIRM



Welcome to The McVey Law Firm! We hope to help you start on a journey to either finally get your estate planning done or to change outdated documents. Below is what we consider a *basic* estate planning checklist. Underneath each item, you'll find short explanations of each document. Be on the lookout for more information coming through email soon!

✓ **Last Will and Testament**

This document disposes of your assets at your death. It can make individual disbursements or make a blanket disbursement to your heirs. It can also provide for guardians for underage children that may be left to be cared for if you are gone.

✓ **Power of Attorney**

In this document, you appoint an agent to act for you if you become incapacitated. Your agent is authorized to transfer property as necessary, to make withdrawals from your retirement assets, or to do anything else that you want your agent to do for you if you become incapacitated.

You should ask the first agent you have appointed if he or she is willing to accept this responsibility for you; if so, be sure he or she has the original or a copy of this document to prove his or her authority to act.

Your Power of Attorney may also contain a nomination of a conservator for you or your estate.

✓ **Authorization for Release of Protected Health Information**

Your Authorization for Release of Protected Health Information is a document required by the Health Insurance Portability and Accountability Act (HIPAA). This document allows the identified persons to obtain protected health information on your behalf in order to make informed decisions about your care and to pay your medical bills.

✓ **Healthcare Power of Attorney**

Your Healthcare Power of Attorney authorizes your agent to make medical decisions for you if you cannot express your wishes or make the decisions yourself. In addition, your Healthcare Power of Attorney authorizes your agent to obtain copies of your medical records. You may revoke your Healthcare Power of Attorney at any time by informing your agent, in writing, that you are revoking the appointment. You should also send a copy of the written revocation to anyone who has a copy of the original Healthcare Power of Attorney.

✓ **Living Will**

Your Living Will informs your doctors that you do not want extraordinary medical measures taken, especially those that would cause you pain or discomfort, if those measures would only prolong the dying process. This document backs up your Healthcare Power of Attorney. Anyone can deliver this document to your doctors if your agent under your Healthcare Power of Attorney is unavailable to make health care decisions for you.