Five Essential Family Documents Checklist

Session 4 - Protecting the Household and the Financial House | Participant Resource | Version 1.0

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The five documents

[ ] Will - directs probate assets and names key representatives, subject to state law.

[ ] Living will or advance directive - records healthcare wishes in applicable circumstances.

[ ] HIPAA authorization - permits specified people to receive protected health information.

[ ] Medical power of attorney - names someone to make healthcare decisions when authorized.

[ ] Durable financial power of attorney - names someone to handle specified financial matters when authorized.

Review with an attorney

These documents must fit state law and your circumstances. FFES does not prepare legal documents or provide legal advice.

Document most in need of attention: ____

Attorney or qualified resource to contact: _____________________________________

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