GUIDE HOW TO WRITE YOUR HEALTHCARE WISHES

Family members often struggle with making healthcare decisions for others. Normally, this is a result of not knowing what the other person would want. When loved ones are not aware of any personal wishes to the contrary, they will generally default to providing higher levels of care. A thoughtful way to help our family members is to write out some guidelines for making healthcare decisions. As you do so, we suggest you consider some of the following questions:

What Kind of Medical Treatment Do I Want or Not Want?

What does life-support treatment mean to you? When would you want it, and when would you not? If you were ever not able to express yourself, how would your loved ones be able to determine when you would no longer want life-support treatment?

Think about the experiences of other family members and friends with end-of-life care. What did you appreciate? What didn't you like? In addition to your own experiences, consider the following examples:

- **Judging capacity:** One person told his family that if he could play solitaire, he would like to be kept alive. Which then prompted other questions: What if he kept losing or started cheating? How well would he need to play to still be considered himself? You may not need to answer with that level of detail, but the more detail you do provide, the easier it will be for your family.
- **Extent of care:** Of all healthcare resources spent during our lifetime, a large amount is often spent during the last few months of life. One person asked his family to act with restraint when it came to his end-of-life care.
- **Length of time:** Yet another person told his family to keep him on life support for at least 10 days, then to reassess whether to keep life support going.

How Comfortable Do I Want to Be?

What personal comforts would you like? This might touch on pain management, personal grooming and bathing, and religion and spirituality. What about hospice care? Again, using specific examples to answer this question will be helpful for your healthcare agent and family.

Consider what else would give you comfort. Would you like to be at home? Would you like someone to pray at your bedside? What will give you peace in your final days?

How Do I Want to Be Remembered?

Addressing this question can be especially helpful when you have multiple loved ones, each of whom may have a different idea of how to honor you. Grief is messy. In voicing your wishes, you can help reduce or eliminate the tensions that can bubble up over picking a song. Some people write out their entire funeral services from start to finish, including who will perform the readings and what songs will be played. Others encourage their family and friends to gather for a toast and scatter ashes at a favorite spot. How do you wish to be remembered and celebrated?

This is by no means a comprehensive list. As you reflect on your wishes, add to and expand on these ideas as much as necessary. We hope this letter gives you the assurance that your wishes will be respected, and that it helps your loved ones who care for you and celebrate you.

GUIDE COMPLETING ASSET HOMEWORK

In the Asset section of this portfolio, you will find a worksheet representing an overview of your assets which was reviewed with you at your signing meeting. The worksheet gives our recommendations for structuring the ownership and beneficiary designations for your assets. Please review the homework section of worksheet for any action items assigned to you for completion. The homework section is on the right-hand side of the page and looks as follows:

Homework

Action Item	*Completed By:*	*Completed:*

Once you have completed your homework, we recommend placing the confirmation of the change or update behind the worksheet. Examples of the documents that are useful to include are: a bank statement confirming the title of your account, a letter from an institution confirming a beneficiary change, a recorded deed, and any document that confirms the ownership of an asset. Including these documents will give your loved ones important information to assist them in locating your assets.

If you need any assistance in transferring assets, updating ownership, or changing beneficiaries, do not hesitate to contact our office.

GUIDE COMPLETING A PERSONAL PROPERTY MEMORANDUM

A Personal Property Memorandum allows you to gift specific tangible items to others outside of your will or trust. Writing a memorandum is optional. Its purpose is to clarify your wishes regarding specific items while also giving you flexibility to change your mind. We have included a template of a memorandum for you to use. You can also find this template on the Document Portal.

The following are guidelines for completing a Personal Property Memorandum:

1. **Create a List of Specific Personal Property:**
   The Personal Property Memorandum must describe the specific item of personal property. Examples of personal property include jewelry, furniture, collections, computers, vehicles, artwork, and pets (we don't consider pets to be property, but our legal system does). Your writing may not be used to give away any property that is not within the strict definition of "tangible personal property." For example, you cannot use your writing to give away cash, bank or stock accounts, liquid assets of any kind, or real estate.

   When completing a Personal Property Memorandum, you should be specific in your description of the item. You are free to change your writing at any time, which allows you flexibility for adding or subtracting items or changing beneficiaries without changing your will or trust.

2. **Identify Who Will Receive Specific Personal Property:**
   Once you have identified the item you wish to gift, list the name of the person you intend to receive the item. Include their full name, relationship to you, and current contact information.

3. **Sign and Date:**
   Sign and date each page of the Personal Property Memorandum you complete. Starting with page one, include a page number on each page.

4. **Send a Copy to our Office and Upload to your Document Portal:**
   Though not required, we recommend that you send a copy of your completed Personal Property Memorandum to our office so we can add it to your file. You can snap a picture and email a copy to us or you can upload it to the Document Portal, and we can retrieve the copy there.

If you need additional copies of the Personal Property Memorandum, you can access the template on the Document Portal, or you can contact our Team and we will send you what you need. Questions? Just reach out to our team. we are happy to help.