

# Legal Documents Checklist

## The Five Documents, and Whether Yours Are Actually Usable

A document that exists but cannot be found, or that nobody knows about, does not exist when it is needed. For each document, check all four columns.

### Part 1: Document status

Document	Exists	Reviewed in last 5 yrs	Location known	Named people told
Will (names an executor)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Financial power of attorney (continuing / enduring)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Power of attorney or directive for personal & health care	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Written wishes about medical care (advance care plan)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Personal inventory (accounts, contacts, where everything is)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

### Part 2: The details that trip families up

Check
<input type="checkbox"/> The named attorney / executor is still able and willing (alive, well, nearby, not estranged)
<input type="checkbox"/> A backup person is named in each document
<input type="checkbox"/> Documents reflect the current province of residence (moved provinces = review)
<input type="checkbox"/> Marriage, divorce, deaths, or a new diagnosis since signing? Book a review
<input type="checkbox"/> Originals are stored where the named people can reach them (not only a safe deposit box)
<input type="checkbox"/> The family doctor knows who the health decision-maker is

### Part 3: Where things are

Item	Location / contact
Original will	

Item	Location / contact
Powers of attorney	
Lawyer or notary (name, phone)	
Executor (name, phone)	
Attorney for property (name, phone)	
Attorney / agent for personal care (name, phone)	

*These documents can only be made while the person has capacity to understand them. If dementia is anywhere in the picture, act the month you start wondering.*