



SAFEGUARDING YOUR LEGAL DOCUMENTS

Now that you have created a will, durable powers of attorney and other legal documents, it is important that these documents are available when needed. Below are a few tips for protecting your legal documents.

- 1) Keep the original version of your will, financial durable power of attorney, health care durable power of attorney and other important legal documents together in a safe place. Make sure that the documents are protected from harm (such as weather disasters and fire) and that they can be easily located when necessary. For instance, you can keep your documents in a locked fireproof, watertight box in your home, but make sure that your personal representative or agents have a key.
- 2) Make sure that your personal representative, and anyone to whom you have given power of attorney, knows where your original documents are located.
- 3) Do not store your original legal documents in a safe deposit box unless you have made arrangements with your bank to provide your personal representative or agent with access to the safe deposit box or you have them listed jointly on the safe deposit box with you. Otherwise, a court order may be necessary to access the documents in the box, which can be a lengthy and difficult process.
- 4) Keep a list of every person and institution to which you have given copies of your legal documents so that you can provide updated copies if you make changes.



Legal Documents	How To Handle Copies
<i>Will</i>	<ul style="list-style-type: none"> ✓ Have only one signed and witnessed original will, stored in a secured box or given to your personal representative. ✓ Do not make any copies. This will prevent others from making changes to your will. ✓ Make sure your personal representative knows where you have stored your original will if you do not give it to them for safekeeping. ✓ The law firm that drafts your will may keep a signed or unsigned photocopy. ✓ The original will is needed to open a probate estate after your death.
<i>Health Care Power of Attorney</i>	<ul style="list-style-type: none"> ✓ Provide a copy to your agent under the power of attorney, your personal representative, your doctors, hospital or nursing home staff, and any other caretakers. ✓ Put your health care durable power of attorney into your medical record. ✓ Post a copy in a visible location in your home to provide notice of your wishes to first responders.
<i>Financial Power of Attorney</i>	<ul style="list-style-type: none"> ✓ Provide a copy to your agent under the power of attorney and your personal representative. ✓ Provide a copy to your bank (or other financial institutions that hold your assets). ✓ Some financial institutions require their own forms. ✓ In order to avoid misuse and financial abuse, be cautious about who receives copies.

Need Help? If you are aged 60 or older and have limited income, please call Legal Counsel for the Elderly at (202) 434-2120.

This flyer is informational only and is not a substitute for legal advice.

