

Get a Life Plan

Frequently Asked Questions

Where should I store my documents?

When you create important planning documents, you will usually take home your original documents, and your attorney's office will usually keep copies. It's important to protect your original documents from being lost or destroyed. You also want to make sure that the people you name in your documents know where the documents are stored and can access the documents in an emergency or after your death. Some good options are to store your documents in a filing cabinet or a fire-proof box and then share that location only with the people who need to know. Remember, if you store your documents in a safe deposit box, you need to make sure that the people you name in your documents will be able to access your safe deposit box too. Most importantly, try to make sure that all of your important legal documents are stored together in one place.

Should I give copies of my documents to my loved ones?

The decision about sharing copies of your documents with loved ones depends on your personal circumstances. If your health is poor or you believe the documents may need to be used in the very near future, it might be a good idea to give copies of the documents to the people you named in the documents. Otherwise, it may be better to only discuss your plan with your loved ones, rather than sharing copies of your documents. Discussing your plan can be especially wise if you anticipate questions that might arise or misunderstandings that could result from your choices. There are reasons you may choose not to share copies of your documents. For documents that take effect after your death, like a Will, remember that you are free to make changes to the document throughout your lifetime. It can be confusing to make changes to your Will if you have already distributed copies of your previous Will to others. You might also worry about hurting people's feelings if you give out copies of your Will and later decide to make changes to your plan. For documents that are needed if you become incapacitated, like a Power of Attorney, a bank will usually require the original document and may not honor a copy. Unless you believe the Power of Attorney will need to be used very soon, the best approach is to make sure the person you name in your Power of Attorney knows where the original document is stored, rather than giving them a copy of the document. This also allows you to revoke the Power of Attorney later if you change your mind, without the concern that copies of the Power of Attorney were already distributed.

Exception: Advance Directive for Health Care. It is almost always recommended to give copies of your Advance Directive for Health Care to the people you name in that document. You should also give a copy of your Advance Directive to your doctor.