

Essential Life Planning Documents

Life planning documents are important for everyone to have so that you can ensure your wishes are carried out in the future. Each life planning document has a different function and this guide is meant to help you decide which life planning documents are right for you.



This guide does not replace the important conversation you must have with an attorney to draft each document!

The City Bar Justice Center's Elderlaw Project and Cancer Advocacy Project are here to help!

Elder Law Project: (212) 382-6658 or <https://www.citybarjusticecenter.org/projects/elderlaw-project/>

Cancer Advocacy Project: (212) 382-4785 or <https://www.citybarjusticecenter.org/projects/cancer-advocacy-project/>

Essential Life Planning Documents: Explained

Will

When deciding if you would like a will, it is important to consider all of your property (the items you own, including bank accounts) and where you would like your property to go when you pass away. You must also choose your executor – someone you trust to carry out your wishes. Preparing a will makes it easier for your loved ones to organize your affairs according to your documented wishes.

Power of Attorney

Choose someone you trust to serve as your agent who can act on your behalf as you direct. This document will not take away your right to make your own decisions, unless you develop a condition where you can no longer make decisions independently. You can grant a variety of powers to your agent including banking, real estate (for example, communicating with a landlord about your lease), insurance matters, and retirement benefits. This document will not allow your agent to make medical decisions on your behalf.

Living Will

This document notifies medical staff of your wishes regarding emergency medical procedures if doctors have determined you are not expected to recover.

Disposition of Remains

Choose someone you trust to carry out your funeral and burial wishes, such as cremation, or provide details of a pre-paid burial plan.

Healthcare Proxy

Choose someone you trust to serve as your agent to make medical decisions on your behalf if, in the future, you become unable to make those decisions yourself. It is very important for you to discuss your wishes with your agent so they can be communicated to your doctors.

Natalie Klein, 2022 Summer Legal Intern of the Cancer Advocacy and Elderlaw Projects, is the author of this publication. This communication is for the general education and knowledge of our readers. Because all legal problems involve their own specific set of facts, this informational resource is not and should not be used as a substitute for independent legal advice. This informational resource also is not intended to create, and its receipt does not constitute, an attorney-client relationship. Please contact competent, independent legal counsel for an assessment of your particular legal concerns, or contact our Legal Hotline (212-626-7383 or <https://www.citybarjusticecenter.org/legal-hotline/>) to determine whether you qualify for assistance from the City Bar Justice Center.