July 25, 2016

[Name/Address]

Re: Estate Planning

Dear [Salutation]:

I have enclosed an original of your Will, two original Powers of Attorney and three original Health Care Directives, a Bequest by List form, and a Will jacket and envelope. In order for the documents to be valid, you will need to do the following (all copies of each document will need to be executed):

A. Last Will and Testament.

1. Put your initials on the line at the bottom right corner of all \_\_\_\_\_ pages.

2. Sign and date your Will, on page \_\_\_\_, in front of two witnesses who are not family members or beneficiaries.

3. Page \_\_\_\_ will need to be dated, and both witnesses will need to sign their names, insert their city of residence, and print their names under their signatures. Then, those same witnesses will need to sign the Affidavit of Subscribing Witnesses on page \_\_\_\_\_. NOTE: THIS CAN ALSO BE A DECLARATION SO THE NOTARY ISN’T NEEDED.

4. Have a Notary Public notarize the witness signatures on the Affidavit on page \_\_\_\_, filling in the appropriate blanks, at the same time your Will is signed by you and the witnesses.

5. Complete, sign and date the Bequest by List (Optional).

B. Power of Attorney.

1. Put your initials on the line at the bottom right corner of all \_\_\_\_ pages of both copies.

2. Sign and date both copies of the Power of Attorney on page \_\_\_\_, and have a Notary Public notarize your signature on page \_\_\_\_ at the same time the Power of Attorney signed by you. THIS HAS TO BE NOTARIZED.

C. Health Care Directive.

1. Date page 1.

2. Put a check mark and your initials next to your selections under paragraph (c) on page 1.

3. Sign page 2 in front of two witnesses who are not family members, beneficiaries, or medical personnel, and have both witnesses sign their names on page 3.

D. Return to Me. Please make a copy of your executed Will and send it to me. Also, please send me an original Health Care Directive and Power of Attorney so we can keep them in our file.