

VIA CERTIFIED MAIL
RETURN RECEIPT REQUESTED

December 13, 20XX

Ms. K.L.
X rd. NE
Anywhere, WA 98000

Re: Final Estate Planning Meeting with K.L. and Closing Letter

Dear Ms. S. :

It was good meeting with you to execute the estate-planning documents that we prepared for you. The purpose of this letter is to summarize the scope of our representation, the estate-planning documents we provided to you, and the advice we gave to you at our last meeting.

At the end of our first meeting, you agreed to hire our clinic to represent you for the purpose of creating an estate-plan to address three events: incapacity, long-term care, and death. You told us that your main goals are:

1. To get your personal autonomy back and your voice in your estate planning documents (you had mentioned to us that you felt like your life was hijacked, so you essentially wanted your life back);
2. To revise and update previous estate planning documents including the Durable Power of Attorney (both financial and healthcare) to reflect your wish that your brother, B. , be sole agent for both documents, as well as make B. the Personal Representative of your Will;
3. To create a trust for both of your sons, R. and S. , to take care of them financially when you are gone;
4. To live and be present with your sons for as long as you possibly can.

During our second meeting, we presented to you several estate-planning documents that we determined would meet your main goals. These documents included a completely new durable power of attorney for finances, a completely new durable power of attorney for health care, a health care directive, a will, and a disposition of remains.

During our third and final meeting, we executed all of the estate planning documents described above, and gave you advice about each one. We enclose the signed originals and two copies of each document with this letter.

In the section below, we will summarize our advice to you about each of these documents.

Durable Power of Attorney for Finances and Health Care:

- These documents grant your attorney-in-fact, your brother B. , the power to act on your behalf with regards to your finances and health care. These powers take effect immediately. Both documents are used by B. to give to others (financial institutions and medical providers) to prove that your attorney-in-fact has the power to act on your behalf. Your alternate DPOA's for both Finances and Health care are your father, G., as first alternate, and your stepmother, A., as second alternate.
- Who should get the original: The attorney-in-fact, B. , should either have the original document to show your medical providers (for Health Care DPOA) when making decisions on your behalf, or to show when transacting business on your behalf (for the Financial DPOA), or he should know where you keep the original and have access to it if needed. E.g. have a key to the safe deposit box or safe; have access to your home safe or fireproof box if it is kept there. If you have a different place in your home where you intend to put these documents, make sure B. knows where and how to access that space.
- Who should get copies of the document?
 - For the Health Care DPOA: All of your doctors, medical providers, any hospital or medical facility that you are admitted to or that serves you. You should also give copies to B. , as well as G. and A. for their records and in case they need to step in to make decisions.
 - For the Financial DPOA: You should give copies to B. , G., and A. Both you and B. should keep your copies in a safe and secure place that is easily accessible. However, if you do put them under lock and key or in a safe, make sure B. has access to them.
- How to revoke the document: To revoke the DPOA for Health Care, you should send a written revocation (sample enclosed) to B. , and a copy of the written revocation to your various medical facilities. To revoke the DPOA for Finances, you should send a written revocation to B. and, if you don't trust B. to stop using the revoked DPOA, you should also send copies of the revocation to all banks or institutions holding your accounts, and/or who have title to your property, etc. so they know that the agent can no longer act on your behalf.

Health Care Directive:

- This document tells your health care agent, attending physician and all hospital staff your wishes regarding continued artificial hydration, nutrition, and respiration in the event that you have a terminal condition or are in a permanent coma/vegetative state; and your general care values for all other care.

- You should keep the original and give copies to both your personal representative, B. , as well as G. and A. and the attending physicians/health care providers to make it part of your medical record.
- You should keep the original in an easily accessible place.
- You can revoke this document by either: 1) destroying or defacing it; 2) written revocation (signed by you and dated) that is then given to your attending physician or B. ; or 3) verbally communicating your revocation to your attending physicians or B. .

Will and Gift List:

- Your Will is a document that provides for the distribution of your property at death and your decisions on care for your sons. The Gift List allows you to make changes to the Will designation of you want to receive your tangible personal property without re-executing the Will.
- You should keep the original and provide a copy to B. , your personal representative.
- Both you and B. should keep your copies in a safe and secure place that is known to and easily accessible by your beneficiaries (your sons)/alternative representatives (G. and A.). However, if you do put the original under lock and key or in a safe, make sure B. has access to it.
- In order to revoke it, you can do so by either: 1) executing another will or separate codicil that expressly revokes your will in whole or in part; or 2) destroying or defacing it.

Disposition of Remains:

- This document tells everyone (family and friends) your wishes for how your body will be disposed after your death.
- You should keep the original and provide a copy to B. .
- You should keep the original with your Will.
- In order to revoke it, you can do so by drafting a new version that is then signed (by both you and the witness) and dated.

Ms. K. L.
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We have PDF copies of all your signed documents and file material in our office if you should need additional copies. Please do not make any marks on the original documents, and only make copies from the copies of the documents that we have enclosed with the originals in this letter.

In closing, this letter brings to an end our representation in creating and executing your estate plan. Should you have any additional questions regarding the estate-planning documents that we provided to you, do not hesitate to contact our supervising attorney, Lisa Brodoff.

We would like to thank you again for giving us the opportunity to help you create an estate plan that will meet your goals for the years ahead. It has been both an honor and a pleasure to represent you. We will now close your file with our office.

We hope you have a great holiday season!

Sincerely,

A. B.
Legal Intern

G. J.
Legal Intern

Lisa Brodoff, Supervising Attorney
WSBA No. 11454

Enclosures