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## CHECKLIST: For a Successor Trustee

This section contains your Advanced Medical Directive with documents that relate to medical care. As with the other original documents contained in this portfolio, you may choose to replace these originals with copies if you prefer to store the originals elsewhere.

Your Authorization for Release of Protected Health Information is a document required by the Health Insurance Portability and Accountability Act (“HIPAA”). This document allows the identified persons to obtain protected health information on your behalf in order to make informed decisions about your care and the payment of medical bills.

Your Healthcare Power of Attorney authorizes your agent to make medical decisions for you if you cannot express your wishes or make the decisions yourself. In addition, your Healthcare Power of Attorney authorizes your agent to obtain copies of your medical records. You may revoke your Healthcare Power of Attorney at any time by informing your agent, in writing, that you are revoking the appointment. You should also send a copy of the written revocation to anyone who has a copy of the original Healthcare Power of Attorney.

Your Living Will serves to inform your doctors that you do not want extraordinary medical measures taken, especially those that would cause you pain or discomfort, if those measures would only prolong the dying process. This document backs up your Healthcare Power of Attorney. Anyone can deliver this document to your doctors if your agent under your Healthcare Power of Attorney is unavailable to make health care decisions for you. To be legally effective, your living will must be witnessed by unrelated disinterested individuals who cannot gain financially from your death.

A Living Will is a state specific document, meaning each state has its own special requirements which must be met for this document to be legally binding on hospitals and physicians. This document has been prepared conforming to the requirements of your state of domicile. If you work, vacation or otherwise spend a good deal of time in states other than your state of principal residence, you should consider having a Living Will executed with the formalities of such other states.

If you wish to be an organ donor, this portion of your portfolio is the place to store an Anatomical Gift Form that gives your consent to the transfer of your organs after death to living persons who need them, or for research.

If you are a Virginia resident, you can store a copy of your health care documents on the Virginia Department of Health Advance Medical Directive Registry ([www.connectvirginia.org/adr](http://www.connectvirginia.org/adr)), and grant access to friends or family members. You will need to establish an online account or contact the Registry at 1-800-548-9455 for instructions on how to register without computer access.