

DOCSBAG SURVIVOR'S GUIDE

If you're a family member or friend of the Owner of the DocsBag, **you have been given access to the Bag because:**



THE OWNER IS CRITICALLY ILL



THE OWNER IS INCAPACITATED AND NEEDS HELP WITH THEIR FINANCES



THE OWNER IS DECEASED

IF THE OWNER IS CRITICALLY ILL:

Go to the **Estate Plan Folder** in the DocsBag and locate the *Medical Power of Attorney*. It may be called a Patient Advocate Designation or something similar. This document will identify the person the Owner named to make medical decisions for him or her. There may also be a document titled Medical Directives. If you're not the person named in the documents, contact the person who is named, and give him or her the original documents

IF THE OWNER IS INCAPACITATED AND NEEDS HELP WITH FINANCES, PAYING BILLS, ETC.:

Go to the **Estate Plan Folder** in the DocsBag and locate the *Financial Power of Attorney*. It may be called a Durable Power of Attorney or something similar. This document will identify the person the Owner named to assist with finances if the Owner is incapacitated. If you're not the person named in the document, contact the person who is named, and give him or her the original documents and the DocsBag.

The person named as Power of Attorney should review the Inventory Record in the Estate Plan Folder for the name of the attorney who drafted the estate plan and contact the attorney.

IF THE OWNER IS DECEASED:

Go to the Estate Plan Folder in the DocsBag and locate the *Trust*. If there is no Trust, locate the Will. If there is a Trust, contact the person named as Trustee. If there is a Will, contact the person named as Personal Representative or Executor. If you're not the person named in the document, contact the person who is named, and give him or her the original documents and the DocsBag.

The person named as Trustee or Executor should review the Inventory Record in the Estate Plan Folder for the name of the attorney who drafted the estate plan and contact the attorney.



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ROAD MAP OF THE DOCSBAG:

There are **12 Folders** in the DocsBag.

Each Folder has a **Label**, i.e. Cash Assets, Insurance, Estate Plan, Legal Records.

In the front of each Folder is an **Inventory Record**. The Inventory Record is a list of the items in that Folder. It also lists the location of items that pertain to the Folder but are stored elsewhere i.e. Savings Bonds in a safe deposit box. Items stored in the Folder will have a checkmark under the folder icon. Items *not* stored in the Folder will have a checkmark under the briefcase icon.

