

These instructions assume you have your final documents printed and ready to sign. Please refer only to the tabs included in your specific bundle (Essentials, Foundation, or Legacy).

PHASE 1: ESSENTIAL PLANNING (ALL BUNDLES)

Tab 2: Living Trust and Assignments

This tab contains three distinct documents.

- **The Living Trust:** Date, sign, and notarize as the creator (and as trustee if you are the sole trustee).
- **General Assignment:** Date, sign, and notarize the Assignment of Personal Property.
- **Tangible Property List:** Optional. Fill out, date, and sign later (no notary required).

Tab 3: Certification of Trust

Date in two locations, sign, and notarize on the final page.

Tab 4: Pour-Over Will

Requires two witnesses, not a notary.

- Sign and date in the presence of two independent witnesses.
- Witnesses must be over 18 and cannot be your spouse or any listed beneficiary.

PHASE 2: COMPREHENSIVE PROTECTION (FOUNDATION & LEGACY)

Tabs 6, 7 & 8: Legal & Health Directives

- **Power of Attorney (Tab 6):** Date, sign, and notarize on the last page.
- **Health Care Directive (Tab 7):** Initial Article 2, then date, sign, and notarize the last page.
- **HIPAA Authorization (Tab 8):** Date, sign, and notarize on the last page.

Tab 9: Final Memorial Instructions

Optional; can be dated and signed later without a notary.

PHASE 3: LIFETIME LEGACY RESOURCES (LEGACY ONLY)

Tabs 11 & 12: Successor Manual & Amendments

These are informational resources for your future use. No signatures are required.

INFORMATION FOR THE NOTARY

Below are helpful notes for your notary. You may use your own acknowledgment pages; if so, strike out our pre-printed pages with a pen.

Notarization Requirements

- **Tabs 2, 3, 6, 7 & 8:** Require standard notary acknowledgment.
- **Tab 4 (Will):** Requires two witnesses only. You may act as a witness if you choose.

Administrative Details

- You may hand-correct the county name if it differs from the printed text.
- Our "he/she/they" pronoun language does not require strike-outs under CA law.
- If questions arise, please call our office at 949-354-2323.