



What to do with Estate Planning Documents After Signing

Although you may have just executed these documents, please take some quiet time to sit down and read them thoroughly. Hopefully, everything is consistent with your wishes, but in the event that you want to change something, it will be necessary for you to seek independent legal counsel. A few frequently asked questions are below:

Can I make copies of the documents?

If you want to make copies of the documents, please **DO NOT REMOVE THE STAPLES**. If the staples are removed it may bring up a question about whether the document has been altered from its original form.

Where should I store the document?

1. If you have a safe deposit box and are interested in storing your documents there, it can be helpful to have two (2) names on the safe deposit box. A court order maybe needed to open the box if only your name is on the box, which means court costs and attorney's fees prior to the probate.
2. If you have a lock box at home, you may wish to place the papers in that locale.
3. You can store your Will for \$5.00 at the Bexar County Probate Clerk's Office. The Probate Clerk's Office is in the basement of the Bexar County Courthouse located at 100 Dolorosa, San Antonio, Texas 78205. Your Will may be deposited in safekeeping with the clerk's office.

Wherever you choose to store your estate planning documents, remember to tell your executor and/or alternate executors (of your Will) and the Agents named in your powers of attorney or other similar documents where the original documents are located!

What should I do with my medical documents?

If you have a Medical Power of Attorney, Directive to Physicians and/or HIPAA Release Form, it is a good idea to give copies to your treating physician and the person to whom you are giving the medical power of attorney to make the decisions regarding your health.

What assets are not covered by the Will?

Please remember that your Will does not control the disposition of certain assets. In particular, any assets that are governed by a contract will be disposed of according to the contract at your death including, but not limited to, payable on death accounts, accounts held jointly with rights of survivorship, pension or IRS accounts and life insurance policies.

We are grateful for your service as an essential worker, and we wish you well.