

WILLS CLINIC

PROCESS

REVIEW TRAINING RESOURCES

Review training videos and templates on SALSA's Resource Library

RECEIVE WILLS QUESTIONNAIRE

Review answers and highlight any issues to address with client

SCHEDULE INITIAL CONSULT WITH CLIENT

Email or call client to set up an initial consult to review questionnaire

CLARIFY CLIENT WISHES DURING CONSULT

Clarify that client's actual wishes are in line with what they have listed in their questionnaire

COMPLETE INITIAL DRAFTS

Draft simple will and ancillary documents using templates in resource library and information provided by client

EMAIL DRAFT FOR MENTOR REVIEW

Email draft will to AlisonM@sa-lsa.org so that the assigned mentor can review it prior to office hours

ATTEND MENTOR OFFICE HOURS

Discuss draft with mentor to ensure there aren't any modifications required

FINALIZE DRAFTS

Make any necessary edits to initial drafts based on mentor feedback.

EXECUTE DOCUMENTS

Client executes documents at SALSA Execution Ceremony/volunteer's office