Prepare for a will and power-of-attorney appointment

durhamlegalservice.com · 11/3/2026 · Personal planning worksheet, not a legal document

Appointment basics

Appointment date and professional or firm

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What I want this appointment to accomplish

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Scope, fee and preparation requirements confirmed
☐ Not yet / not applicable

Existing documents

Where the current will is kept, if any

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Where property POA documents are kept, if any

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Where personal-care POA documents are kept, if any

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Changes since documents were last reviewed

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Discussion points

Questions about executor or estate-trustee responsibilities

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Questions about attorneys and substitute decision-makers

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Broad asset categories or cross-border issues to discuss privately

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Family or dependant matters to raise with the lawyer privately

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Willingness of proposed decision-makers discussed where appropriate

☐ Not yet / not applicable

After the meeting

Documents the lawyer requested and secure delivery method

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Decisions still to make

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Signing, original-document storage and review questions

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Next action and follow-up date

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Keep this copy somewhere appropriate. No account required to print. Source: https://durhamlegalservice.com/guides-checklists-planners/will-poa-appointment-planner/