

CALIFORNIA ESTATE PLAN SIGNING CHECKLIST

This is an important process to complete precisely as described below to ensure your will and estate plan are valid. Do not sign more than one copy of your documents. Your signature on the documents will revoke any prior documents.

***DO NOT SIGN UNTIL YOU ARE IN THE PRESENCE OF
THE NOTARY PUBLIC AND BOTH WITNESSES.***

1. Prepare to sign:

Documents preparation:

- Print your documents (do not staple or sign them yet)
- Keep all documents together but separate the documents that need notarization

Witnesses preparation:

Arrange for TWO witnesses who are at least 18 years old to watch you sign. The witnesses do not need to read the documents.

For ALL documents your witnesses MAY NOT be any of the following people:

- A relative of yours by blood, marriage, or adoption
- A person who will inherit from you when you die
- Anyone you appointed in this document

Additional conditions on witness selection for **Advance Directive for Health Care:**

- Any of your health care providers or their employees
- An operator of a community care facility or their employees
- An operator of a residential care facility for the elderly or their employees
- If you are in a skilled nursing facility, you must speak with your patient advocate or ombudsman, as they will need to sign the form in Part 6.1
- Note: You can arrange for a notary public OR two disinterested witnesses

2. Make it official:

Plan Your Notary Arrangement:

Prepare to have your Witnesses and Notary with you in the same room at the same time.

- Documents that required Notary
 - General Durable Power of Attorney - Isaac Morgan
 - Advance Healthcare Directive - Isaac Morgan
- Decide on where you will Notarize your documents
 - Use a Notary you already know; or
 - Hire a Notary Agent to come to your home; or (<https://www.signingagent.com/>)
 - Go to a UPS Store with Notary Services (<https://www.theupsstore.com/store-services/notary-services>)
 - Many UPS Stores have a notary & witnesses on staff
 - Bring enough witnesses to have a total of two
 - Online Notary through Notarize (<https://www.Notarize.com>)

- Only available for the following states at this point: AZ, CO, FL, IN, NV, ND, UT, VT
- You will need to sign up and upload PDFs of your documents
- Arrange for your witnesses to be with you and then submit the request to notarize.com

Sign Your Documents:

- Have black or blue pens and Photo ID ready for you and your witnesses
- Select who will be your First Witness and Second Witness to streamline signing
- Sign your name at the bottom of every page of your Will
- Carefully scan for short blank lines _____ to determine where you may be required to initial the page AND long blank lines with your name underneath for your signature _____
- Double check that all documents have been signed by both the Notary and Witnesses where required

3. Secure your documents:

- Scan a copy of your documents with a scanner or phone
 - Instructions - iPhone <https://cutt.ly/YWtTl61> Android <https://cutt.ly/6WtTOs7>
 - Upload the scan or photos to MyAdvocate.co
- Securely store your physical documents in a safe location that your family or advocates can locate and then go to MyAdvocate.co to indicate where they are stored
- Visit the Community tab on the MyAdvocate.co website to notify and educate people you have named in your estate plan (your Advocates). Notifying people involved in your estate plan increases the likelihood of your wishes being carried out.

Continue to build and share your legacy with confidence and clarity.