Personal Directive Checklist

Things to consider when making a Personal Directive

1. Revocation
   - If there are previous ones that are being revoked: locate, get back, and destroy or revoke in writing

2. Choosing an Agent(s)
   - Who to name?
   - One or more to add jointly?
   - Consider one or more alternates
   - What skills, attributes, resources, experience do they have that make them appropriate?
   - Do they understand what it involves?
   - Have they agreed?
   - Gather all the information these people need
     - For example: the location of your Personal Directive / where to find all of your health and personal information
   - Keep in mind family dynamics

3. Powers
   - Consider what powers to give them (a little or a lot)
   - Be clear
4. Other Content Considerations

☐ Who makes decision about when and how the Personal Directive will come into effect?

☐ Who is to be notified that the Personal Directive has come into effect (and who do you not want notified)?

☐ How / when are decisions of the Agent(s) to be reviewed?

☐ Payment for the Agent

5. Completion of Document

☐ Will you use a lawyer or not?

   You may wish to consult a lawyer if you have complicated needs or plans, if you’re concerned someone will challenge your capacity, or if there are any family difficulties

☐ Make sure all legal requirements are met

6. What to do with it

☐ Give your Personal Directive to individuals who you want to have a copy

   For example: Lawyer, Attorney(s) under Power of Attorney

☐ Keep a list of who has a copy (in case you need to get them back later)

☐ Keep the original in a safe place

7. Review regularly

For more information, check out the following free publications at http://www.cplea.ca/publications:

Making a Personal Directive
Being an Agent