

THE 18+ CHECKLIST

ESSENTIAL DOCUMENTS FOR EVERY ADULT

Once a child turns 18, their parents no longer automatically have access to their medical information or financial accounts. In an emergency, having the right documents in place ensures the appropriate and desired party can step in quickly to support.

THE TWO KEY DOCUMENTS

Medical Directive

Outlines medical wishes and names an agent to communicate on your behalf if you become incapacitated or pass away.

Medical Directives also include:

- access to medical records (HIPAA release)
- organ donation wishes
- autopsy authorization
- burial/cremation wishes
- end of life decisions (life support)

*This document is important because California and Federal law states that doctors cannot discuss ANY of your private medical information with ANYONE without your verbal or written consent.

Power of Attorney

...a legal document that designates someone to make financial and legal decisions on your behalf if you become incapacitated or otherwise unable to manage your affairs.

This appointed individual has access and the authority to:

- pay your bills
- bank accounts
- sign your name
- business
- taxes
- contract with attorneys
- contract with realtors to sell property to pay for daily expenses
- government benefits

WHEN?

It's ideal to put these documents in place before your student leaves for school. However, our estate planning attorneys offer zoom sessions if your student has already left.

HOW?

1. Download county or state-specific forms.
 - a. Some health plans offer medical directives - check with your health plan.
 - b. [See resources for LA County here.](#)
2. Review with a notary or attorney.
3. Keep copies in both digital and hard-copy.



This one-pager is for informational purposes only, it does not substitute for legal advice. Please let us know if you would like to connect with one of our trust attorneys.