



Understanding the 3 Core Planning Documents

	Health Care Directive	Power of Attorney	Last Will & Testament
What the document does:	explains what medical care you want if you are unable to make or communicate your own health care decisions.	allows someone you trust to help manage your financial and legal matters or take over those responsibilities if you cannot manage them yourself.	explains how your money, property, and belongings should be distributed after you die
When it takes effect:	It is only used when you are not able to understand information to make an informed health related decision or communicate your health care decisions.	Depending on how the document is written, a Power of Attorney may: <ul style="list-style-type: none"> • take effect immediately, allowing someone to assist you while you still make your own decisions, or • continue into the future if you become unable to manage your affairs. 	It only takes effect after your death.
Who makes it happen:	The person you appoint as your HEALTH CARE PROXY , working with your doctors and medical team.	The person you appoint as your ATTORNEY .	The person you appoint as your EXECUTOR .
Their responsibilities:	Make health care decisions based on the instructions in your directive, your values and beliefs, and your best interests.	Act in your best interests, follow your instructions, keep records, and manage your finances responsibly and honestly.	Locate and protect assets, pay debts and taxes, and distribute the estate according to your will.
Outcome:	Health Care Proxy speaks for you and ensures your care reflects your wishes when you cannot speak for yourself.	Your Power of Attorney supports or manages your quality of life according to your wishes and the instructions you have provided.	Your Executor carries out the instructions you left for your estate after your death.