

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