



Pro Bono Checklist

Senior Law Project

January 2023

The below checklist is a step-by-step guide for your representation of your client:

Visit the VOLS Pro Bono Library (volsprobono.org/probonolibrary) and carefully **review** the documents therein, as well as any emails sent to you by VOLS about your client. Materials you should review include:

- Document Templates
- This Manual
- Client Execution Instructions
- Any information contained in or attached to emails you receive from VOLS about your client
- Any training videos posted by VOLS



Call your client.

- Introduce yourself to them. Explain that VOLS has placed their case with you and that you are working on drafting their life planning documents.
- Obtain any necessary substantive information that you need in order to be able to draft your client's documents.
- With respect to the Power of Attorney, discuss each item that calls for initials with your client. Advise and explain the pros and cons of each option and ask your client whether or not they would like to initial each one.
- With respect to the living will, discuss each item that calls for an "X" with your client and have them tell you which lines they do and do not want to place an "X" next to.




Draft your client's documents.

Engage in additional conversations with your client as necessary. If your client uses email and they wish to review their documents, send them electronic copies for review. Otherwise, send hard copies to your client

for review. Confirm the accuracy of all information contained in each document with your client.

Send drafts of your client's documents to **lifeplanningdocuments@volsprobono.org** for review, and inform VOLS as to the details of how your client will execute. After you make edits based on VOLS' feedback, please send final versions to VOLS for final review.

 **Finalize** and print your client's documents. Staple the Last Will & Testament, the affidavit of attesting witnesses and any additional relevant affidavits together. (You may staple the other documents as well but stapling of other documents is not required and can make scanning & copying difficult.)



Schedule an execution ceremony at which you and others from your firm will be present to act as witnesses and to notarize. This ceremony can take place at the firm or at your client's home, or at another mutually agreed-upon location. Your client should leave this meeting with their executed, witnessed, and notarized documents in hand. Please provide a scan of the executed copies to VOLS.



Congratulate yourself for providing such a necessary service to low income seniors in New York City and, please reach out to VOLS when you are ready to take on another case.