*[Date]*

*[Client Name]*

*[Address]*

Re: Original Estate Planning Documents

Dear *[Client Name]*:

I enjoyed working with you to create your comprehensive estate plan. I have enclosed your original signed estate planning documents. Please sign the enclosed receipt confirming you have received these documents.

1. **Revisions to Documents.** If any circumstances change, please do NOT write on any of your original documents as this may have significant legal repercussions. You can use a sticky-note to mark where things have changed and potential revisions you would like to make. Call me right away to discuss the contemplated revisions.
2. **Storage of Original Documents.** Please keep your estate planning documents safe. As we discussed, I recommend keeping them in a fireproof safe in your garage. With that said, here is a summary of the common storage options.
3. **Storing Your Estate Planning Documents in Your Safe Deposit Box**. The benefit of a safe deposit box is that your estate planning documents remain safe from destruction, fire, theft, and inquisitive beneficiaries. A disadvantage, however, is that the contents cannot be accessed on weekends or bank holidays, so this may result in access issues. Contact your bank regarding the costs for an appropriately sized box.

Depending on the circumstances, I may recommend against adding beneficiaries as signers on your safe deposit box since doing so may give their creditors the right to seize the contents of your box. You may, however, want to add your personal representative as a signer. Although Oregon law was changed in recent years to allow certain interested persons to open your box after your death to search for and retrieve your original Will, this process involves legal paperwork. Further, the Personal Representative may not remove any assets from the safe deposit box without authorization from the court. So, if a probate is not otherwise required for your estate, it may still be necessary simply to allow your Personal Representative to remove the contents of your safe deposit box (aside from the Will). Therefore, adding your personal representative as a signer to your box now will save time, paperwork, and money. If you have any questions about adding your personal representative or someone else as a signer to your box, please call me. Make sure you provide information regarding where the box and key are located to make accessing the box easy.

1. **Storing Your Estate Planning Documents in Your Home.** The benefit of storing your estate planning documents at home is that they remain easily accessible. Unfortunately, this may also be a disadvantage. For example, an angry beneficiary may obtain your original Will and destroy it before other beneficiaries discover what has happened.

Storing your estate planning documents at home without the benefit of a locked, fireproof box or safe also means that they are vulnerable to theft, fire, or other destruction. *If something should happen to your estate planning documents, please call me at once so I can prepare new original documents for you to sign.*

1. **Storing Your Estate Planning Documents at Home in a FireProof Box or Safe.** Many clients choose this option over a safe deposit box. While fireproof boxes or safes can be a good storage alternative to protect your estate planning documents, they can also be a target for thieves. There are companies that can bolt your safe to the floor to further protect the contents. Make sure your personal representative knows where the box or safe is located, and how to access the box or safe, if locked.
2. **Advance Directive.** Your heirs, loved ones, or health care providers may need access to your original Advance Directive on short notice. Although safety is always a consideration, quick accessibility is the most critical factor in choosing a storage location for this document. I recommend that you give a copy of your Advance Directive to your health care representative and your primary care physician, so this important document is easily accessible if it becomes necessary.

Please let me know if you have any questions.

Warm Regards,

[Attorney]

[Firm]

Enclosures

**IMPORTANT NOTICES**

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