



# Federal Bar Association

## WILLS FOR VETERANS INITIATIVE

This is an initiative that FBA President Hon. Michael Newman would like all Chapters to strongly consider undertaking, one that is near and dear to his heart. The initiative, as you know, will be a Wills for Veterans Day, a *pro bono* project where your chapter will provide will drafting and signing services to any veterans in your local area.

Veterans Day this year falls on **Saturday, November 11th**, and **Friday, November 10th** will be the federal holiday observing Veterans Day. We propose that you hold your program on **Thursday, November 9th**, but you certainly are free to hold it on another day of your choosing.

The Dayton Bar Association **held their first Wills for Veterans program** this past November and it was a huge success. While all FBA Chapters will certainly be free to plan and execute your program as you see fit, here is a template on how the Dayton program was run, to hopefully assist each Chapter in planning and executing their own program.

If you have any questions regarding the Wills for Veterans initiative, please contact Todd Hedgepeth ([james.hedgepeth@us.af.mil](mailto:james.hedgepeth@us.af.mil)) of the San Antonio Chapter. Todd will be leading this national initiative and he will be your primary contact.

## WILLS FOR VETERANS PROGRAM TEMPLATE

Chapter Name: \_\_\_\_\_

Chapter Liaison: \_\_\_\_\_

### **As soon as possible:**

— **Designate your chapter's Wills for Veterans Liaison:**

The Liaison will undertake the Wills for Veterans project for your chapter and serve as the point-of-contact for your chapter with FBA National. If your Chapter is going to participate in this program, please send the name and e-mail address of your chapter's Wills for Veterans Liaison to Kate Rust ([krust@fedbar.org](mailto:krust@fedbar.org)) and Todd Hedgepeth ([james.hedgepeth@us.af.mil](mailto:james.hedgepeth@us.af.mil)).

### **By August 31:**

— **Choose a location:**

The Dayton program was held at the local VA Hospital, and the VA Hospital assisted greatly in advertising the program. If there is not a VA hospital near you, consider alternative locations (firms, courthouse, etc.) Once your chapter has secured a location, please send this information to Kate Rust ([krust@fedbar.org](mailto:krust@fedbar.org)).

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**Publicize the Event to Local Veterans:**

Contact your local VA hospital, VFW, American Legion and other veterans' organizations to let them know about the event. Be specific about time, location and any documentation that participants will need to bring with them. Advertise early and often.

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**Seek appropriate number of volunteer attorneys, paralegals, and notaries, as well as volunteer witnesses:**

Each chapter/geographic area has its own unique population (veteran presence, number of attorneys, law firms, etc.) Seek what you believe to be the appropriate number of volunteer attorneys, paralegals, notaries and volunteer witnesses.

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**Explore the possibility of offering CLE to volunteer attorneys and paralegals:**

For the Dayton program, there was a local wills and estates attorney who conducted a 1 1/2-hour training session prior to the program to teach and educate the attorneys and paralegals on estate planning in the state of Ohio (every state will have its nuances), as well as computer training on drafting the wills. 1.5 hours of CLE was obtained and provided for the training.

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**Liability Insurance Coverage:**

To avoid any type of malpractice liability, the DBA ensured that all attorneys had an active malpractice policy, and the wills were limited to basic estate planning (no trusts, etc.) If a client needed a will that was not "basic", the Chapter had obtained a list of local practicing estates attorneys that they would refer them to (at a reduced rate, which had worked out with the attorneys the clients were being referred to).

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**Find yourself an expert:**

It would be best to find a local experienced wills and estates attorney to give the initial training, and be there on site for the program. For the Dayton program, paralegals did the intake and drafted the initial will, an attorney volunteer reviewed it and answered any questions, and an experienced will and estates attorney would then do a final review. If you don't have an experienced wills and estates attorney in your Chapter, you might want to consider approaching one in your local area and offer him/her an honorary FBA membership if they assist with the program.

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**Consider seeking a partner:**

If some other organization in your area already has a program like this for Veterans, you might want to consider partnering with them and doing a joint-program.

**By September 10:**

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**Create a will questionnaire:**

For the Dayton program, a questionnaire that was created included questions regarding any VA benefits they were receiving, what type of military funeral service they preferred, etc. Here is the link to the guided interview they used for a will in Ohio.

<https://lawhelpinteractive.org/Interview/InterviewHome?templateId=5667>

Also, *enclosed* with this package is a sample will questionnaire, provided by Mr. James Richardson, former FBA National President and current Vice Chair of the FBA's Veterans and Military Law Section, that you may find of use in your program.

— **Secure resources:**  
For the Dayton program, computers and printers were donated temporarily from local law firms.

— **Beware of solicitation:**  
No private solicitation of other legal services was allowed by the participating attorneys and paralegals, unless asked.

**By December 1:**

— **Publicize the success of your chapter's Wills for Vets Initiative:**  
After your program has taken place, please feel free to submit a brief recap of your chapter's Wills for Vets program and any photos for inclusion in *The Federal Lawyer* magazine. Please send the recap and photos to Kate Rust ([krust@fedbar.org](mailto:krust@fedbar.org)) **by December 1, 2017.**



Alternate Personal Representative:

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Name

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Address

Guardian of any children (if applicable):

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Name

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Address

Alternate Guardian

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Name

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Address

Primary Legatee(s) (Who inherits)

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Name

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Address

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Name

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Address

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Name

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Address

Residuary Legatee(s) (Who inherits if all others are deceased or refuse inheritance)

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Name

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Address

Special Gifts (Heirlooms etc.)

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Information for Durable Medical Power of Attorney

Primary Decision Maker:

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Street

\_\_\_\_\_  
City State Zip

Phone Number: \_\_\_\_\_

Alternate Decision Maker(s):

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Street

\_\_\_\_\_  
City State Zip

Phone Number: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Street

\_\_\_\_\_  
City State Zip

Phone Number: \_\_\_\_\_