

# Legalize Your *Legacy*®

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## Launch Essentials *Intake*

For the young adult heading to college. These four documents ensure a parent or trusted adult can step in during a medical or financial emergency once your student is 18 — when, by law, you otherwise can't. Please complete and return before drafting begins.

Included: **Health Care Power of Attorney** · **Financial Power of Attorney** · **HIPAA Authorization** · **FERPA Release**

### *I.* The Student

|                      |                    |                      |
|----------------------|--------------------|----------------------|
| FULL LEGAL NAME      | DATE OF BIRTH      | AGE                  |
| HOME ADDRESS         | CITY / STATE / ZIP |                      |
| STUDENT CELL PHONE   | STUDENT EMAIL      |                      |
| COLLEGE / UNIVERSITY | STATE OF SCHOOL    | START DATE / MOVE-IN |

### *II.* Health Care Decision-Makers

Who should make medical decisions for the student if they cannot, and receive their medical information (HIPAA)? Usually a parent. Name a first choice and an alternate.

| ROLE            | FULL NAME & RELATIONSHIP | PHONE | EMAIL |
|-----------------|--------------------------|-------|-------|
| Primary Agent   |                          |       |       |
| Alternate Agent |                          |       |       |

ANY MEDICAL CONDITIONS, ALLERGIES, OR WISHES WE SHOULD NOTE?

### *III.* Financial Decision-Makers

Who should handle financial or legal matters for the student in an emergency (banking, tuition, insurance, a lease)? Usually the same parent, but it can differ.

| ROLE            | FULL NAME & RELATIONSHIP | PHONE | EMAIL |
|-----------------|--------------------------|-------|-------|
| Primary Agent   |                          |       |       |
| Alternate Agent |                          |       |       |

SAME AS HEALTH CARE AGENTS ABOVE?

☐ Yes, same people    ☐ No, as listed above

### *IV.* FERPA — School Records Release

FERPA protects a college student's education records. This release lets the school share records (grades, enrollment, conduct, financial) with the people the student names.

| NAME & RELATIONSHIP | PHONE | RECORDS THEY MAY ACCESS |
|---------------------|-------|-------------------------|
|                     |       |                         |
|                     |       |                         |

### *V.* Anything Else

QUESTIONS, SPECIAL CIRCUMSTANCES, OR ANYTHING WE SHOULD KNOW

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