

By Teresa Scharf

## Dissection of a Wills Clinic

You may have heard or read about the PACO/LASC *Pro Bono* Wills Clinics over the last 3½ years and wondered what they are really all about. Who operates these clinics? How are they structured? Who is helped by these clinics? Where are the clinics conducted, and how often are they offered?

In collaboration with the Legal Aid Society of Columbus (whose malpractice insurance coverage is extended to volunteers), the *Pro Bono* Wills Clinics are operated by the *Pro Bono* Committee of PACO, the Paralegal Association of Central Ohio. The program is a mobile clinic that travels to “low income” senior citizen residential facilities throughout Central Ohio twice a month from January through October. These are document-driven events where Simple Wills, Durable Financial Powers of Attorney, Advance Directives for Health Care (Living Will, Health Care Power of Attorney, and Organ Donor Designation) are constructed for individuals who have few assets and do not have the resources to retain private counsel. The Wills Clinics are staffed with attorneys, paralegals, and law students who volunteer their time and expertise. Having completed a cost-free but mandatory CLE, the volunteers have been trained to serve the clientele and provide guidance and counsel in this unique setting.

The Clinics are conducted on weekday evenings after business hours, beginning at 5:30 p.m. and concluding in the 8 o'clock hour. Upon arriving at a location, volunteers find a designated room with tables and chairs, where several laptop computers and wireless printers are arranged and waiting for their use. Loaded onto each laptop are templates for a Simple Will and a statutory form POA, in Word format. Also provided for the volunteers are supplies such as legal pads, pens, staplers, etc.

Prior to each clinic date, several preparations have been made. The site has been visited and the Service Coordinator of the facility has been provided with intake questionnaires and other information for the residents. A few days before the clinic date, each resident/client will have had an intake interview conducted for Legal Aid's purposes and records. Following that

appointment, each client's Advance Directives documents will have been drafted.

On the Wills Clinic date, each resident is situated with an attorney/paralegal (or law student) team. Using the information gathered during the intake appointment, the attorney talks with the client(s) to answer questions and execute the Advance Directive documents (that were previously generated) while the paralegal (or law student) simultaneously enters information into the laptop computer and generates the Simple Will and Financial Power of Attorney. Then the attorney guides the client in executing those documents and the volunteers serve as witnesses. The client(s) are provided with a nice pocket folder to organize and retain all the original papers. At the conclusion of each Clinic, the documents are removed from each laptop and not kept by Legal Aid or PACO. On a typical evening, each attorney/paralegal team meets with two clients.

Since this program was launched, 50 Wills Clinics have been conducted and over 500 individuals have been served in Central Ohio. If you are interested in learning more, please contact Teresa Scharf at [ProBonoColumbus@gmail.com](mailto:ProBonoColumbus@gmail.com).



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