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Your behavioral health practice consultants

Professional Wills: Checklist

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When developing your "Professional Will" or "Practice Emergency Plan" be sure to include the following information:

Who is Responsible:

- ☐ For taking charge and executing your Professional Will?
- ☐ For serving as a backup to your Executor?

What Procedures Need to be Followed to:

- ☐ Access to all business and clinical records, and related technologies
- ☐ Contact your accountant, attorney(s), bank, landlord(s), and malpractice carrier

What Professional Actions Need to be Taken to:

- ☐ Notify clients and colleagues
- ☐ Decide on the disposition of active cases and related matters

Other Considerations:

- ☐ Be cautious about using templates
- ☐ Provide a copy to the Executor and other key individuals
- ☐ Periodically review and update the document

Member Note: TPI members have access to our expanded guides. For more information about developing your "Professional Will" or "Practice Emergency Plan" be sure to check out our Tips Guide.

The practice of your dreams can be your reality. If you're looking for personalized guidance or more on this topic, consider a one-on-one consultation with a TPI consultant. Contact us at support@thepracticeinstitute.com to arrange a convenient time.

TPI members have access to our expanded checklists, guides, and tips; a free one-on-one consultation; access to our on-demand Answer Desk; and free small group discussions on a variety of practice needs.

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