

ESTATE PLAN CHOICES

A. EXECUTOR

The executor is the person nominated in your Will and appointed by the probate court to handle matters after your death. The executor must collect, manage and, if necessary, sell your property; pay your debts and taxes; and then distribute what is left as you specify. The executor will report to the probate court about those activities. The executor is also responsible for other tasks--for example, terminating leases and credit cards, and notifying people and organizations of your death.

Partner #1

Please list **at least two** individuals, in order of preference, who you want to serve as executor and backup executor(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

Partner #2

Please list **at least two** individuals, in order of preference, who you want to serve as executor and backup executor(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

B. GUARDIAN

A guardian is an adult (or a corporation or public agency) nominated by you and appointed by the probate court, who will act on behalf of your minor or incapacitated adult child if you both die or become incapacitated yourselves. The guardian manages the financial and/or personal affairs of that child.

If your child(ren) need a guardian, please list in order of preference who you want to serve as guardian and backup guardian(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

C. FINANCIAL POWER OF ATTORNEY

In this power of attorney you share authority with another (your agent) to manage your financial matters and your property as needed while you are alive.

Partner #1

Please list **at least two** individuals, in order of preference, who you want to serve as agent and backup agent(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

Partner #2

Please list **at least two** individuals, in order of preference, who you want to serve as agent and backup agent(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

D. HEALTH CARE POWER OF ATTORNEY

In a health care power of attorney you authorize another to make medical decisions for you if you are not able. Please list **at least two** individuals, in order of preference, who you choose to serve in this role, and their relationship to you:

Partner #1

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

Partner #2

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

E. LIVING WILL DECLARATION

Some people want to discontinue "life sustaining" treatment if they are terminally ill and that treatment serves only to prolong their dying. A living will becomes your voice if you are unable to express this choice for yourself at the end of life. It also contains similar instruction should you be in a persistent vegetative state.

Partner #1

Do you want a living will? Yes No

Partner #2

Do you want a living will? Yes No

F. HIPAA AUTHORIZATION

This document authorizes your medical providers to share information about your health care and status with the people you choose.

If there are any members of your immediate family (partner and children) that you want to **exclude** please identify them:

If there are people outside of your immediate family that you want to **include**, please identify them:

G. TRUSTEE

A trust may be needed as part of your estate plan if, for example, you have minor children, a family member with a disability, real estate located in several different states, or estate tax concerns. The trustee is an individual, or a bank or trust company, who manages the trust property according to the directions that you give in the trust agreement. In a trust, the person who creates it (i.e., you) is usually the initial trustee.

Partner #1

Please list **at least two** individuals or entities, in order of preference, who you want to serve as trustee and backup trustee(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

Partner #2

Please list **at least two** individuals or entities, in order of preference, who you want to serve as trustee and backup trustee(s), and their relationship to you:

1) Name: _____ Relationship: _____

2) Name: _____ Relationship: _____

3) Name: _____ Relationship: _____

CONTACT INFORMATION
(other than immediate family)

Please provide all contact information for any individuals other than yourselves or your children whom you have identified above. If any individual can best be contacted via pager, please provide that information.

Name: _____

Name: _____

Address: _____

Address: _____

Phone Numbers: H: _____

Phone Numbers: H: _____

C: _____ W: _____

C: _____ W: _____

Name: _____

Name: _____

Address: _____

Address: _____

Phone Numbers: H: _____

Phone Numbers: H: _____

C: _____ W: _____

C: _____ W: _____

Name: _____

Name: _____

Address: _____

Address: _____

Phone Numbers: H: _____

Phone Numbers: H: _____

C: _____ W: _____

C: _____ W: _____

Name: _____

Name: _____

Address: _____

Address: _____

Phone Numbers: H: _____

Phone Numbers: H: _____

C: _____ W: _____

C: _____ W: _____