

# Estate Planning Design Essentials

## Financial Decisions

If you are unable to manage your finances, who do you trust to manage them for you? If you are married, spouses are typically named as the first agent. Please include full legal names (first, middle, last) for each person listed.

CLIENT 1	CLIENT 2
1.	1.
2.	2.
3.	3.
4.	4.

## Medical Decisions

If you are unable to make your own health care decisions, who do you want the doctors to talk to on your behalf? If you are married, spouses are typically named as the first agent. Please include full legal names (first, middle, last) for each person listed.

CLIENT 1	CLIENT 2
1.	1.
2.	2.
3.	3.
4.	4.

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## Minor Children (skip if you do not have minor children)

In the unfortunate event that you are unable to raise your minor children (under age 18), who do you want to have physical custody of the children ("Guardian")? When selecting a Guardian, it is important to choose someone who shares your values, goals and parenting styles.

If you are unable to raise your minor children, you will also need to appoint someone to handle the finances for the children ("Conservator"). When selecting a Conservator, it is important to choose someone who shares your financial goals and has proven to be financially responsible.

It is recommended, but not required, to name different individuals to act as Guardians and Conservators. It is counterproductive to name one individual to perform both job functions if they are not the best person for the job. Separating these responsibilities into two different individuals provides a system of checks and balances for the children.

GUARDIAN	CONSERVATOR
1.	1.
2.	2.
3.	3.

## Distribution

Upon your death, where do you want your "stuff" to go? Check all boxes that apply.

### Married Couple

Upon the first death, everything stays with the surviving Spouse.

*Upon the 2nd Spouse's death, distribute remaining assets to:*

Distribute everything to my children, in equal shares. If a child predeceases, distribute their share:

To that child's descendants

To that child's Spouse (not common)

Back to our surviving children

Other: \_\_\_\_\_

To my closest living relatives

Distribute a specific amount to a charity or named individual(s). Describe below.

\_\_\_\_\_  
\_\_\_\_\_

Other: \_\_\_\_\_

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## Single Person

Distribute everything to my children, in equal shares. If a child predeceases, distribute their share:

- To that child's descendants
- To that child's Spouse (not common)
- Back to my surviving children
- Other: \_\_\_\_\_

To my closest living relatives

Distribute a specific amount to a charity or named individual(s). Describe below.

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Other: \_\_\_\_\_