



Appointments-People to assist you if you become sick or handle your estate

One of the most important aspects of any estate plan is the "appointment" of various persons to assist you and your family in times of need- particularly when death or disability strikes. These appointed "helpers" are called by different names depending on the type of estate plan you elect to implement. In this form, we try to avoid labels. Instead, we focus on the roles these helpers play in protecting your family and your estate. Include each person's contact information: Agent Name, Phone Number, Email Address, and Mailing Address.

Guardians- Who do you nominate to serve as guardian for your minor children (if any)? Please provide home address, phone number and email address.

Client 1 Responses (Please provide full contact information - Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Client 2 Responses: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Financial Agents/"Helpers"- If you were incapacitated for any period of time, who would you choose to handle your financial affairs? Please provide home address, phone number and email address.

Client 1 Responses: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Client 2 Responses: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Health Care Agents/ "Helpers"- If you were incapacitated for any period of time, who would you choose to make health care decisions for you? Please provide home address, phone number and email address.

Client 1 Responses: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Client 2 Responses: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Estate Fiduciary/"Helpers"-If you were deceased, who would you choose to administrate and distribute your estate? (Personal Representatives). Please provide home address, phone number and email address.

Client 1 Response: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

Client 2 Responses: Legal Name (on Drivers License), Address, Phone Number and Email Address)

Initial Choice

Back up #1

Back up #2

