

FIDUCIARY APPOINTMENTS

Below are fiduciary appointments you will make in your estate planning documents. If you know who you would like to serve in these roles at this time, please list the individual's or company's full, legal name. If you do not know, feel free to leave them blank for now. You can name joint fiduciaries in any of these roles.

I. General Durable Power of Attorney

1. Who should make business and financial decisions if you cannot make them for yourselves:

First Choice: _____ Spouse's First Choice: _____

Second Choice: _____ Spouse's Second Choice: _____

Third Choice: _____ Spouse's Third Choice: _____

II. Advance Directive for Health Care

1. Who do you want making health care decisions for you?

First Choice: _____ Spouse's First Choice: _____

Second Choice: _____ Spouse's Second Choice: _____

Third Choice: _____ Spouse's Third Choice: _____

III. Will

1. Who should be named as the Executor (Personal Representative) of your estate? Please name at least one successor Executor.

First Choice: _____ Spouse's First Choice: _____

Second Choice: _____ Spouse's Second Choice: _____

Third Choice: _____ Spouse's Third Choice: _____

If you have children please complete question 2.

2. If you (and your spouse if applicable) were no longer living, who should have custody of your minor or disabled children? You may name an individual or a couple to serve together. Please also name at least one successor guardian.

First Choice: _____

If this is a couple, should the survivor serve as guardian if one of them is not living at the time of your death? Yes No

Second Choice: _____

If this is a couple, should the survivor serve as guardian if one of them is not living at the time of your death? Yes No

Third Choice: _____

If this is a couple, should the survivor serve as guardian if one of them is not living at the time of your death? Yes No

3. If you choose to set up a trust for your beneficiaries, who should manage the property until the beneficiaries are entitled to receive it? Please also name at least one successor Trustee.

First Choice: _____

Second Choice: _____

Third Choice: _____