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# GUARDIAN WORKSHEET

Planning for parents with children under 18 or disabled adult children is extremely important to make sure the parent's wishes for their children are carried out. This sheet presents questions to help you decide on or confirm your children's guardians.

A. For each of your children, please provide the names and ages, describe any special needs or physical or mental disability, and approximate values of assets owned by that child:

Name and Age	Special Needs, Disabilities	Assets

B. If you have previously named a guardian for any child, please identify that person:

\_\_\_\_\_

C. The following questions raise issues to consider in evaluating the person or persons you might designate as a guardian. Not all of the questions may be applicable. Use these questions as a starting point to determine if the guardian you are considering is a good fit for your wishes:

	Yes	No	Unsure
1. Is this person a member of your child's extended family?			
2. Is this person likely to be alive when your child reaches majority?			
3. Is this person emotionally stable?			
4. Do you find this person's lifestyle acceptable?			
5. Does your child know and like this person?			
6. Is this person's home in an acceptable area, and can it accommodate your child?			
7. Does this person share your moral values?			
8. Does this person share your religious beliefs?			
9. Do you approve of this person's spouse?			

This information sheet is intended as an informative document. It is important you consult with an attorney to form a complete estate plan.

	Yes	No	Unsure
10. Do you expect your child and this person's children to get along together?			
11. Does this person share your views about the value of education?			
12. Is this person financially secure?			
13. Do you believe that this person's marriage is stable?			
14. Is this person healthy enough to raise your child?			
15. Does this person have the time to raise your child?			
16. Is this person capable of managing your child's own assets?			
17. Would your child select this person as guardian, if asked?			
18. Are you certain that this person will act as guardian?			

D. Designating more than one person at a time to act as guardian of the person can pose difficulties. If you were to designate a husband and wife to act together, who would be the guardian if they separated or divorced? If you were to designate two people who did not live together, where would the child live? It is prudent to designate at least one person to act as successor guardian in case your primary choice dies, becomes incapacitated, or declines to act. If you designate a married person as guardian, you may want to name his or her spouse as successor guardian, to keep you child in the same home.

Please indicate, in the order in which you would like them to act, the names of the people you would like to designate as guardian of your child's person. These are the people who will raise your child.

Name	Relationship	Home Address
1.		
2.		
3.		
4.		
5.		

E. If you would like to designate the trustee of your child's property other than the guardian of your child's person, please indicate the names of those persons, in the order in which you would like them to act. These are the people who will take care of your child's assets. If you want the same person or persons to act as both guardian of your child's person and trustee of their property, please skip this section.

Name	Relationship	Home Address
1.		
2.		
3.		
4.		
5.		

F. Other issues

	Yes	No	Unsure
1. If you have more than one child, do you prefer that they stay together with the same guardian?			
2. Would you like to make provisions in your will or trust allowing the guardian and the guardian's family to move into your home to accommodate your child or children?			
3. Would you like to make a provision in your will or trust giving your trustees discretion to distribute some of your money to reimburse the guardian's expenses in either acquiring a new home or expanding the existing home to accommodate your child or children?			
4. Would you like to make a provision in your will or trust allowing some of your money to be used to raise the standard of living which you have provided for your own child or children?			