



WHO SHOULD I CHOOSE?

Estate Planning Decision-Maker Guide™

Choose the qualities first. Then consider the person.

THIS IS ONE OF THE MOST COMMON PLACES PEOPLE GET STUCK.	A GOOD CHOICE IS NOT ALWAYS THE MOST OBVIOUS CHOICE.
You do not need to make every decision today. Start by thinking about the qualities the role requires. Then consider who in your life best fits those qualities and who could serve as a backup.	Age, birth order, or being the closest relative does not automatically make someone the right fit. Think about trust, judgment, reliability, willingness, and the ability to act when needed.

THE PEOPLE YOUR PLAN MAY ASK YOU TO CHOOSE		
ROLE	WHAT THE ROLE MAY INVOLVE	QUALITIES TO CONSIDER
Trustee / Successor Trustee	May be responsible for managing trust property and carrying out the trust instructions.	Trustworthy • organized • responsible • able to follow instructions • comfortable handling family dynamics
Financial Power of Attorney	May be authorized to handle financial matters if you cannot handle them yourself.	Good judgment • dependable • financially responsible • willing to keep good records
Healthcare Decision-Maker	May make healthcare decisions when you cannot communicate or make them yourself.	Calm under pressure • good listener • understands your wishes • able to communicate with family and medical professionals
Personal Representative / Executor	May be responsible for handling matters connected with your estate after death.	Responsible • organized • patient • able to complete paperwork and follow through
Guardian for Minor Children	May care for minor children if a guardian is needed.	Shares important values • capable and willing • stable • able to provide the kind of home and care you want

QUESTIONS TO ASK YOURSELF	
■ Do I trust this person to follow my wishes, even if they would make a different choice for themselves? ■ Is this person responsible and dependable? ■ Can this person make difficult decisions without creating unnecessary conflict?	■ Is this person likely to be willing and available when needed? ■ Have I considered whether distance, health, age, or other responsibilities could make the role difficult? ■ Who would be my backup choice if my first choice could not serve?

MY POSSIBLE CHOICES			
Role	First person I am considering	Backup person	Questions / concerns
Trustee / Successor Trustee			
Financial Decision-Maker			
Healthcare Decision-Maker			
Personal Representative / Executor			
Guardian, if applicable			

STILL NOT SURE WHO TO CHOOSE? That is a good question to bring to a complimentary Family Legacy Review™ . We can help you understand the roles and think through the decision without making the choice for you.	CLAIM MY LEGACY™ 602-550-7365 ClaimMyLegacy.com Schedule your complimentary Family Legacy Review™
EDUCATIONAL NOTICE This guide is provided for educational and organizational purposes and is not legal, tax, investment, financial, or insurance advice. Individual circumstances vary, and appropriate professional guidance may be needed.	

PROPRIETARY USE NOTICE: This publication, including its original text, organization, checklists, graphics and educational presentation, is proprietary to Claim My Legacy. No reproduction, adaptation, resale or commercial distribution is permitted without written authorization.