



Important Roles for your Estate Plan

Guardian (For Children Under 18)

The Guardian will be responsible for every aspect of your child's well-being, just as you are responsible for your child now.

Executor

After your passing, you'll want to have somebody in place who can execute your wishes. An executor typically offers the will for probate, takes action to protect the assets of the estate, makes distributions of property to beneficiaries and pays the debts and taxes of the estate.

Trustee (For those with a Trust-Based Estate Plan)

The trustee acts as the legal owner of trust assets, and is responsible for handling any of the assets held in trust, tax filings for the trust, and distributing the assets according to the terms of the trust.

Health Care Durable Power of Attorney

A Durable Power of Attorney for Health Care is a document that lets you name someone else to make decisions about your health care in case you are not able to make those decisions yourself. It gives that person (called your agent) instructions about the kinds of medical treatment you want.

Financial Durable Power of Attorney

The durable financial power of attorney is simply a way to allow someone else to manage your finances in the event that you become incapacitated and are unable to make those decisions yourself. Specifically, it grants someone legal authority to act on your behalf for financial issues.

Declaration of Desire for Natural Death (Living Will)

A living will is a written, legal document that spells out medical treatments you would and would not want to be used to keep you alive, as well as your preferences for other medical decisions, such as pain management or organ donation.