

## PLANNING INFORMATION RECORD

To be most respectful of your time, better understand your planning needs, and effectively identify solutions for you, please complete as much of the following information it applies to you. If you need additional space, please use a separate piece of paper.

NAME:

Name (Legal): \_\_\_\_\_

Name on License: \_\_\_\_\_

If Widowed/er, please include name of your spouse and date of passing:

\_\_\_\_\_

Primary Residence: \_\_\_\_\_

City, State, Zip \_\_\_\_\_

Preferred Phone: \_\_\_\_\_ Alternate: \_\_\_\_\_

Email: \_\_\_\_\_

Birthdate: \_\_\_\_\_

Anniversary: \_\_\_\_\_ Years Married \_\_\_\_\_

Child(ren)'s Name(s)	Child of Both/1/2	M/F	Birthdate	Marr'd/Div'd/ Single (M/D/S)	# of Children

# PLANNING INFORMATION RECORD

## DECISION MAKERS

An important aspect of your planning is the appointment of the right person or person(s) to oversee decision making at a point in the future when it becomes necessary for someone else to act on your behalf. As you consider your choice(s), think about the capability and dependability of the person(s). Many times, parents want to include all children so as not to hurt someone's feelings. These appointments should not be made based on feelings, but on capacity and appropriateness. In today's financial world, multiple appointees all need to be actively involved with all decisions. Each will need to be present, at least initially, at each financial institution. The assumption of financial institutions is that if you appoint multiple agents jointly, they all need to be actively involved. To make it more challenging, each financial institution has different policies as to what will need to be done. A person may resign or defer, but that requires specific documentation that adds complications at a time when you want to have straight-forward solutions.

There may be a strategic reason to have two Financial Decision Makers. However, for Health, it is best to have only one at a time or use a provision in which the document names two with an "or" relationship. This can be discussed in more detail during our planning meeting.

There are two primary decision making types:

- 1) Financial
  - a. Authority include banking, property, and retirement plans
  - b. Titles include Executor, Trustee, Attorney-in-Fact
- 2) Health
  - a. Authority to permit, withhold treatment and procedures, discharge and admit
  - b. Titles include Healthcare Representative and Healthcare Attorney-in-Fact
- 3) Guardian: To care for children under 18 years of age.

	SPOUSE 1	SPOUSE 2
<b>Financial: 1)</b>		
2)		
3)		
<b>Healthcare: 1)</b>		
2)		
3)		
<b>Guardian: 1)</b>		
2)		