

HOW TO PICK YOUR TRUSTED PERSON(S)



Choosing people to be your agent or guardian can be a daunting task, as this individual or selected individuals are responsible for making important decisions on your behalf.

CONSIDER PERSONAL QUALITIES

Look for someone who possesses qualities such as responsibility, reliability, empathy, and good judgment. The person should be emotionally mature and capable of handling potentially challenging situations.



CLOSE RELATIONSHIP

It's essential to have a close and trusting relationship with the people you select. This person should understand your values, beliefs, and preferences and be willing to advocate for your best interests.

GEOGRAPHICAL PROXIMITY

Physical proximity can make it easier for your person to fulfill their responsibilities effectively.



WILLINGNESS TO SERVE

Have an open and honest conversation with the person you are considering as your guardian. Make sure they are willing to take on the responsibility and understand the scope of the role.

FINANCIAL RESPONSIBILITY

If you have significant assets or financial considerations, consider someone who is financially responsible and capable of managing financial matters on your behalf.



LEGAL & HEALTH CONSIDERATIONS

Make sure the person(s) are legally qualified to serve according to the laws in your jurisdiction. They should also be in good health and likely to be able to fulfill the role when needed.



FAMILY DYNAMICS

Consider the impact of your choice on family dynamics and relationships. It's essential to select someone who can navigate potential conflicts and ensure the well-being of all involved parties.



BACKUP & ALTERNATES

Consider designating an alternate person(s) in case the primary is unable or unwilling to serve at the time of need.



PARENTAL SKILLS (IF APPLICABLE):

If you have minor children, consider someone who has strong parental skills and shares similar parenting philosophies to yours. This person(s) should be able to provide a stable and loving environment for your children.



Remember that choosing this person(s) is a personal decision, and it's okay to take your time to evaluate potential candidates carefully.

Having a well-thought-out estate plan, including the appointment of an agent(s) can provide peace of mind and ensure that your wishes are respected when the time comes.

Contact our office for legal advice about the specific language that would best fit your needs