



Planning Ahead

Checklist: Planning Ahead for Minor Children

Choosing a guardian for your minor children is not something that anyone wants to think about, but it is very important to plan ahead if you do have minor children. This checklist provides some key things to think about and steps to take to ensure your minor children are cared for according to your wishes.

- Choose the right person to serve as guardian of your minor child. You can use the attached worksheet to help you make this important decision. But here are some key factors to think about:
 - Who does your child currently feel comfortable around?
 - Where does the potential guardian(s) live?
 - Will your child have to move schools, cities, state, etc.?
 - Would the guardian move to your child's location?
 - What is the potential guardian's parenting style like?
 - How was the guardian raised as a child?
 - What is the potential guardian's lifestyle like?
 - Do they already have children?
 - How old are they?
 - Does the potential guardian have a stable job and secure financial situation?
 - Is this potential guardian also going to be your child's financial trustee?
 - If not, who would you like to be your child's financial trustee?
 - Consider a secondary guardian, in case the first guardian is unavailable. Note: if you choose a couple, you should only name one person in the couple, or choose the second person as a secondary guardian.
- Include your choice of guardian(s) in your will.
- Document instructions about your wishes. For example, you could write a:
 - Letter to your child's guardian detailing wishes and desires for how your child is to be raised.
 - What type of school do you want your child to attend, do you want your child raised in a certain faith, or visit with certain family members regularly?
 - Letter to your child's trustee or guardian detailing wishes and desires for how your child is to be financially raised.
 - Do you want them to get a job and work their way through school or be able to focus solely on their studies? Would you want them to have a new car or a safe used car? How much would you help with in paying for a wedding, starting a business, or buying a house?
- During your life, if you are unable to make medical decisions for your minor child, you can designate an adult to make those decisions instead. Some states have a Health Care Consent for Minor Children form that you can use. You can also write up your own document or contact an attorney to learn about your state's rules.
- Make a list of your child's health care providers, any current medications your child is taking, and any immunizations that your child has received.
- Create a list of contact information for important family members and friends.
- Create a list of important advisors such as your estate planning attorney, accountant, or financial advisor.

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	Potential Guardian's Name	Potential Guardian's Name	Potential Guardian's Name
VALUES			
1. I agree with how this person raises his/her own kids (choose 0 if he/she has none).	1.	1.	1.
2. This person's religious beliefs are in line with mine.	2.	2.	2.
3. I agree with this person's views on discipline.	3.	3.	3.
4. I agree with decisions this person makes in his/her own life.	4.	4.	4.
5. I agree with this person's choice to be a working parent or stay-at-home parent.	5.	5.	5.
6. I like this person's interests, hobbies, and other people he/she associates with.	6.	6.	6.
RELATIONSHIPS			
1. My child has a great relationship with this person.	1.	1.	1.
2. I trust this person.	2.	2.	2.
3. I have known this person a long time.	3.	3.	3.
4. This person is family, or as close as family.	4.	4.	4.
5. This person has a network of friends and family who support him/her.	5.	5.	5.
6. My child gets along with this person's children (choose 5 if this doesn't apply)	6.	6.	6.
AGE			
1. This person acts appropriately for his/her age.	1.	1.	1.
2. This person is young enough to be energetic while my child is growing.	2.	2.	2.
3. My child is young enough that age matters.	3.	3.	3.
4. This person is in good health.	4.	4.	4.
LOCATION			
1. My child spends a lot of time in this person's house.	1.	1.	1.
2. If my child lived with this person, my child wouldn't have to move out of town.	2.	2.	2.
3. If my child lived with this person, my child wouldn't have to change schools.	3.	3.	3.
4. My child has been to where this person lives and likes it.	4.	4.	4.
TOTAL SCORE:			

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