

FIDUCIARY APPOINTMENTS FOR ESTATE PLANNING DOCUMENTS

NOTE: If you appoint multiple Successor Fiduciaries and they are to serve consecutively, list them on separate line; if they are to serve jointly, list them on the same line followed by “jointly”.

Last Will and Testament

Executor: The person(s) who will be responsible for administering your estate.

Initial Executor(s): _____

Successor Executor(s): _____

Guardians for Minor Children: The person(s) who will serve as Guardian for your minor children.

Guardian(s): _____

Revocable Trust

Trustee: The person(s) responsible for managing and administering your trust.

Initial Trustee(s): _____

Successor Trustee(s): _____

General Durable Power of Attorney

Agent: The person(s) who will manage your financial affairs during a period of incapacity.

Initial Agent(s): _____

Successor Agent(s): _____

Advance Health Care Directive

Health Care Agent: The person(s) who will make your medical decisions if you are unable to express your own wishes.

Initial Agent(s):

Successor Agent(s):

HIPAA Authorized Representatives

In addition to the Health Care Agents listed in your Advance Health Care Directive, your doctors/attending physicians, etc., would be authorized to share your otherwise protected medical information with your HIPAA Authorized Representatives.

Designation of Person to Make Arrangements for Funeral and Disposition of Remains

Designee: The person(s) who will have authority to make arrangements for your funeral and the disposition of your remains (i.e., cremation, interment, entombment, etc.).

Initial Designee(s):

Successor Designee(s):
