



PRIVETTE LEGACY PLANNING

ROLES LIST

A. PERSONAL REPRESENTATIVE (also called Executor) UNDER YOUR WILL

Name of Personal Rep.

Relationship to You _____

Address (City, State) _____

Alternate Pers. Rep.

Relationship to You _____

Address (City, State) _____

2nd Alternate

Relationship to You _____

Address (City, State) _____

B. TRUSTEE OF REVOCABLE LIVING TRUST UPON YOUR DEATH

Name of Trustee

Relationship to You _____

Alternate Trustee

Relationship to You _____

2nd Alternate

Relationship to You _____

C. TRUSTEE OF REVOCABLE LIVING TRUST UPON YOUR INCAPACITATION

Name of Trustee

Relationship to You _____

Alternate Trustee

Relationship to You _____

2nd Alternate

Relationship to You _____

D. AGENT UNDER YOUR DURABLE POWER OF ATTORNEY (*Handles financial matters*)

Name of Agent

Relationship to You

Alternate Agent

Relationship to You

2nd Alternate

Relationship to You

E. INFORMATION NEEDED FOR HEALTH CARE POWER OF ATTORNEY

Health Care Agent

Relationship to You

Full Address

Telephone Numbers

E-mail Address

Alt. Health Care Agent

Relationship to You

Full Address

Telephone Numbers

E-mail Address

2nd Alternate

Relationship to You

Full Address

Telephone Numbers

Email Addresses

F. GUARDIANS FOR MINOR CHILDREN

Please designate whether named individuals are the permanent guardian (in case of death) or standby guardian (in case of emergency or temporary incapacitation). Use additional sheets as necessary.

Name of Guardian

Relationship to You

Full Address

Phone No. & E-mail

Alternate Guardian

Relationship to You

Full Address

Phone No. & E-mail

2nd Alternate

Relationship to You

Full Address

Phone No. & E-mail

G. CARETAKER FOR PETS

Name of Caretaker

Relationship to You

Full Address

Phone No. & E-mail

Alternate Caretaker

Relationship to You

Full Address

Phone No. & E-mail

2nd Alternate

Relationship to You

Full Address

Phone No. & E-mail