



Appointment Schedule of

Power of Attorney *This document allows another person to handle your financial affairs should you become disabled or incapacitated. This document becomes invalid upon your death. Co-agents can be appointed.*

Primary Agent/Co-Agents _____

Address _____

Email _____

Successor Agent _____

Address _____

Email _____

2nd Successor Agent _____

Address _____

Email _____

Monitor (Optional) _____

Address _____

Email _____

Health Care Proxy *This document authorizes another person to make health care decisions for you if you are unable to make them for yourself. Co-agents cannot be appointed.*

Primary Agent _____

Address _____

Telephone Number(s) _____

Email _____

Successor Agent _____

Address _____

Telephone Number(s) _____

Email _____

2nd Successor Agent _____

Address _____

Telephone Number(s) _____

Email _____

Last Will and Testament *This document outlines how your tangible personal property and other assets not otherwise beneficiary-designated will be distributed upon your death.*

Executor: *The Executor arranges for the payment of final debts and expenses and oversees the distribution of your property. Co-executors can be appointed.*

Primary Executor _____
Email _____

Successor Executor _____
Email _____

2nd Successor Executor _____
Email _____

Trustee: *The Trustee manages and distributes assets owned by stand-alone trusts or trusts created under your last will and testament. Co-trustees can be appointed.*

Primary Trustee _____
Email _____

Successor Trustee _____
Email _____

2nd Successor Trustee _____
Email _____

Guardian: *If you have children under the age of 18, please complete this section. Co-guardians can be appointed. If co-guardians are appointed, indicate whether or not one guardian may serve alone if the other is unable.*

Primary Guardian(s) _____

Email(s) _____

Successor Guardian(s) _____

Email(s) _____

2nd Successor Guardian(s) _____

Email(s) _____
