

ESTATE PLANNING

Workbook

Choosing a Guardian for Your Minor and Special
Needs Children



CREATED BY LESLIE QUINN, ESQ.



CHOOSING THE BEST PERSON TO RAISE MY CHILDREN

This tool helps you build a simple personal framework around choosing a person or family that will be best suited to care for my children should my spouse and I be unable to care for them. I am considering family values, expectations, ability, relationship, personality, willingness and other factors that I feel will positively impact the lives of those I leave behind. No matter what happens, I will feel calm and assured that my children are in a safe, loving environment..

My Top 3 Priorities For My Children's Future

My Top 3 Choices for a Guardian

What values do I want my children to understand and which Choice of Guardian can impart those values?

Values

Benefits-Strengths of Each Guardian

List Values In Order of Importance.

Value 1-

Value 2-

Value 3-



CHOOSING THE BEST PERSON TO RAISE MY CHILDREN

This tool helps you build a simple personal framework around choosing a person or family that will be best suited to care for my children should my spouse and I be unable to care for them. I am considering family values, expectations, ability, relationship, personality, willingness and other factors that I feel will positively impact the lives of those I leave behind. No matter what happens, I will feel calm and assured that my children are in a safe, loving environment..

My Top 3 Expectations For My Children's Future

My Top 3 Choices for a Guardian

Which choice will raise my children so they can become the person I would have raise them to be?

Expectations

Benefits-Strengths

List What Your Expectations Are in Order of Importance.

.....

.....

.....



CHOOSING THE BEST PERSON TO RAISE MY CHILDREN

This tool helps you build a simple personal framework around choosing a person or family that will be best suited to care for my children should my spouse and I be unable to care for them. I am considering family values, expectations, ability, relationship, personality, willingness and other factors that I feel will positively impact the lives of those I leave behind. No matter what happens, I will feel calm and assured that my children are in a safe, loving environment..

My Top 3 Expectations For My Children's Future

My Top 3 Choices for a Guardian

Which choice has the stability as well as the capacity or ability to raise my children?

Expectations

Benefits-Strengths

List the potential guardians in order of financial and home stability, and capacity.

.....

.....

.....



CHOOSING THE BEST PERSON TO RAISE MY CHILDREN

This tool helps you build a simple personal framework around choosing a person or family that will be best suited to care for my children should my spouse and I be unable to care for them. I am considering family values, expectations, ability, relationship, personality, willingness and other factors that I feel will positively impact the lives of those I leave behind. No matter what happens, I will feel calm and assured that my children are in a safe, loving environment..

My Top 3 Expectations For My Children's Future

My Top 3 Choices for a Guardian

Which choice has some level of relationship as well as the ability to emotionally connect with my children?

Expectations

Benefits-Strengths

List the potential guardians based on their relationship with my children.

.....

.....

.....



CHOOSING THE BEST PERSON TO RAISE MY CHILDREN

This tool helps you build a simple personal framework around choosing a person or family that will be best suited to care for my children should my spouse and I be unable to care for them. I am considering family values, expectations, ability, relationship, personality, willingness and other factors that I feel will positively impact the lives of those I leave behind. No matter what happens, I will feel calm and assured that my children are in a safe, loving environment..

My Top 3 Expectations For My Children's Future

My Top 3 Choices for a Guardian

Which choice has the personality and characteristics of someone who I would feel that would be a great role model for my children? (May include religious beliefs, health, lifestyle, mentorship/leadership considerations.)

Expectations

Benefits-Strengths

List the best choice of potential guardian based on character, beliefs, morals, etc..

.....

.....

.....



CHOOSING THE BEST PERSON TO RAISE MY CHILDREN

This tool helps you build a simple personal framework around choosing a person or family that will be best suited to care for my children should my spouse and I be unable to care for them. I am considering family values, expectations, ability, relationship, personality, willingness and other factors that I feel will positively impact the lives of those I leave behind. No matter what happens, I will feel calm and assured that my children are in a safe, loving environment..

My Top 3 Expectations For My Children's Future

My Top 3 Choices for a Guardian

Which choice has expressed the willingness to assume the responsibility of raising my children, and what do they feel they can provide? Do they feel that would be a great role model and mentor for my children? (This will require you to interview the potential guardian and obtain their feelings and opinions.)

Expectations

Benefits-Strengths

Which potential guardian has expressed a willingness and level of commitment to raise your children in accordance with your values and expectations?

Best Person

Alternate

Alternate

Take stock and TAKE ACTION!

NOTE: The questions are deliberately vague - so, write down whatever pops into your mind.

1. **Family Values** (What are your family values?)

2. **Expectations** (What do you think you want for a family scenario?)

3. **Obstacles** (What things are frustrating you or are obstacles to your plan?)

4. **Desires** (What characteristics of a model guardian are you looking for?)

5. **Relationship** (Are you secure with their ability to raise your children?)

Review your answers above, then imagine and write down what you will do to address each within the next week:

1st Key Observation

Action 1

2nd Key Observation

Action 2



SUCCESS Planner

Date:



My Top 3 Priorities

Goals

What I Must Do

- ☐
- ☐
- ☐
- ☐
- ☐
- ☐
- ☐

Obstacles:

Issues to Address:

Action Steps:

Productivity Accelerators and
Conversations



REVIEW

What have I realized about this exercise?

What have I learned about how I want my children raised?

What could I do to improve any outcome for my children?

Choosing A Guardian

Please provide the name and contact information of the person you want to name as guardian and successor guardian of any minor children if your spouse is not living at your death (if applicable):

Guardian Name:

Guardian Address:

Guardian Phone Number:

Successor Guardian Name:

Successor Guardian Address:

Successor Guardian Phone Number:
