

MONEY SCHOOL

This worksheet is intended to help you organize your thoughts as you select guardians for your children.

Start by making a short list of options. Remember that a guardian will have two jobs*:

1. To make decisions for the child – the same decisions you would be making if you were alive.
2. To manage any money left to the child.

*Note: While most guardians are responsible for both jobs, if you would like to choose someone who either doesn't want to or doesn't have the skills to manage the finances, you can choose two different people and split the roles.

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Next, narrow down your list by asking yourself the following questions about each potential guardian:

1. Does this person have the time to take care of my children?
2. Does he or she share my values?
3. Is this person young enough and in good enough health to take on this challenging and lengthy task?
4. Is the person geographically desirable, or would the person – or my children – be required to move?
5. Does he or she have the resources necessary (or will I be leaving enough in life insurance or other resources so that's not an issue)?
6. Is he or she willing to do it?

You can use this chart to help you compare potential guardians:

Name	Time	Values	Health	Location	Resources	Willing
	Y/N	Y/N	Y/N	Y/N	Y/N	Y/N

