

List of Roles in Other People's Lives

If you've agreed to be someone's executor, guardian, power of attorney, or trustee, they're counting on you.

When you die, those people need to know that you can no longer fulfill those roles. They'll need to appoint someone else.

This section documents all the formal roles you hold in other people's lives so your executor knows who to notify.

WHY THIS MATTERS

If you're someone's executor and you die, they need to update their Will and appoint a new executor.

If you're the guardian named in someone's Will for their children, they need to know so they can name a replacement.

If you're someone's power of attorney and you die, they're left without anyone to make financial decisions if they become incapacitated.

Your executor needs to notify these people so they can make alternative arrangements.

Let's document the roles you hold.

Your List of Roles in Other People's Lives

Roles you hold for others, so those people know to make new arrangements.

EXECUTOR ROLES (NAMED IN SOMEONE'S WILL)

PERSON 1 NAME	RELATIONSHIP / CONTACT
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PERSON 2 NAME	RELATIONSHIP / CONTACT
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GUARDIAN ROLES (FOR SOMEONE'S CHILDREN)

PARENT / CHILD NAME	RELATIONSHIP / CONTACT
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POWER OF ATTORNEY (YOU ACT FOR SOMEONE)

PERSON'S NAME	TYPE / CONTACT
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HEALTH CARE PROXY / MEDICAL DECISION-MAKER

PERSON'S NAME	RELATIONSHIP / CONTACT
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TRUSTEE ROLES

TRUST / PERSON	DETAILS / CONTACT
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Your List of Roles in Other People’s Lives (cont.)

OTHER ROLES

ROLE 1	DETAILS / CONTACT
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ROLE 2	DETAILS / CONTACT
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NOTES: ANYONE WHO RELIES ON YOU IN A FORMAL ROLE