

List of Roles in Other People's Lives



Not for me: this section does not apply

Tick here and in the Contents, then skip ahead (no need to print it either).

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 fulfil 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 may be left without anyone to make financial decisions if they become incapacitated, unless they named a backup. Letting them know means they can check their arrangements and appoint a replacement if needed.

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

PERSON 2 NAME

RELATIONSHIP / CONTACT

GUARDIAN ROLES (FOR SOMEONE'S CHILDREN)

PARENT / CHILD NAME

RELATIONSHIP / CONTACT

POWER OF ATTORNEY (YOU ACT FOR SOMEONE)

PERSON'S NAME

TYPE / CONTACT

ENDURING GUARDIAN / MEDICAL DECISION-MAKER

PERSON'S NAME

RELATIONSHIP / CONTACT

TRUSTEE ROLES

TRUST / PERSON

DETAILS / CONTACT

Your List of Roles in Other People’s Lives (cont.)

OTHER ROLES

ROLE 1

DETAILS / CONTACT

ROLE 2

DETAILS / CONTACT

NOTES: ANYONE WHO RELIES ON YOU IN A FORMAL ROLE

Extra Space

More room for your List of Roles in Other People's Lives section: extra entries, stories, or anything the boxes could not hold.