

Future Care Planning Series: Importance of Powers of Attorney for Parents and Caregivers

Powers of Attorney Decision Worksheet

How-To Guide

Understanding your Powers of Attorney is a critical step in creating your Future Care Plan. Completing this worksheet will help you identify your “money people” and your “care people” – the individuals who will advocate for your interests when you cannot.

Please follow the steps below to complete your [Powers of Attorney Decision Worksheet](#).

Step 1: Identify Your “Money People”

- **Brainstorm:** Think about people you know who are organized, trustworthy, and good with finances.
- **List:** Write their names down.
- **Evaluate:** Circle the top three choices you feel are best suited to make financial decisions on your behalf.
- **Rank:** Order them 1, 2, and 3.

Step 2: Identify Your “Care People”

- **Brainstorm:** Think about people you know who are caring, understand your values, and can make difficult medical decisions.
- **List:** Write their names down.
- **Evaluate:** Circle the top three choices you feel are best suited to oversee your personal and medical care.
- **Rank:** Order them 1, 2, and 3.

Step 3: Reference Your List

Keep this worksheet handy. You will refer to these names when you fill out your official Powers of Attorney legal forms.

Step 4: Consult a Professional

Take your completed worksheet with you to your estate planning meeting with an attorney to ensure your wishes are legally binding.

For more information about completing your Powers of Attorney Decision Worksheet, please watch the Importance of Powers of Attorney for Parents and Caregivers webinar.

Investment advisory and financial planning services are offered through Simplicity Wealth, LLC, an SEC-registered investment adviser. SEC registration does not constitute an endorsement of the firm nor does it indicate that the adviser has attained a particular level of skill or ability. Investments involve the risk of loss. Protected Tomorrows does not provide legal or tax advice. Information provided is for informational purposes only and should not be construed as legal or tax advice. Clients and prospective clients are encouraged to consult with their own legal and tax professionals regarding their specific situations. Protected Tomorrows is a DBA of Simplicity Wealth. Angelman Syndrome Foundation is not an affiliated entity of Simplicity Wealth, LLC. Simplicity Wealth provides charitable support to the Angelman Syndrome Foundation. Angelman Syndrome Foundation does not endorse or recommend any investment advisory services or products. SWG 5363013-0426c