

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

## Powers of Attorney: Decision Worksheet

### The Money People™

List the person(s) who you want to consider for the future job of managing financial decisions for you.

| Order | Name | Address | Relationship |
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### Other Important Information

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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. SWG 5577526-0626b

## The Future Care People

List the person(s) who you want to consider for the future job of making medical decisions for you (i.e., Power of Attorney for Medical Decisions).

| Order | Name | Address | Relationship |
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