



the 7 essential
steps parents
must take when
naming a
guardian

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the 7 essential steps a parent must take when naming a guardian

1.

If you name a couple to act as guardians, make sure you include what should happen if the couple divorce or break up. This should be clearly spelled out.

You should also decide what happens if one of the individuals dies or becomes incapacitated. Should the survivor be the sole guardian, or would you like to name a different individual or couple? Documenting this properly is critical to ensuring the well-being and care of your children, no matter what.

2.

Name more than one potential guardian. What if something happens to your first choice? Decide and document who will succeed your first nominee. We generally recommend naming 3 alternates, especially if your children are very young.

3.

You may not need to consider the financial resources of prospective guardians when deciding who should raise your children. Your guardians do not have to (and often should not) be the financial decision makers for your kids. You need to leave enough money behind and put it in Trust to ensure the funds are cared for properly.

4.

Consider creating a Living Trust that prevents a Court from taking jurisdiction over your money through probate, which is totally public. In addition, consider using a Lifetime Asset Protection Trust to protect your money from possible future ex-spouses and lawsuits.

5.

Exclude anyone who might challenge your guardian decisions or who you know you'd never want to care for your kids. Do it in writing. Don't feel bad or guilty about this – making sure your children are raised in a loving environment is ultimately more important than hurting anyone's feelings.

6.

Make arrangements for the short term if you were in an accident. What would happen to your kids in those immediate hours until your permanent guardians could arrive. We recommend a Kids Protection Plan[®] to cover that critical time of care.

7.

Make sure your temporary guardians know what to do in case of an emergency and have all of the necessary documentation.

Keep reading to see what you can do to make sure your kids would always be taken care of by people you know, love and trust –

no matter what.

Take Control of Your Legal Life and Ensure the Well-Being and Care of
Your Family with a COMPLIMENTARY
Life and Legacy Planning Session
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The Planning Session is absolutely FREE and there is NO obligation and NO pressure.

I know that meeting with a lawyer isn't high on your list of fun things to do. Many of our clients felt the same way before their planning session, but absolutely LOVE it after they've with us! They love the peace of mind that comes with knowing everything is set up the right way for themselves, their future and their loved ones.

AND...

To reward you for taking the time to read this guide and learn more about ensuring that your children are taken care of by people you know, love and trust, we will give you a **\$250 certificate** towards any planning you do with our office.

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