



A CLIENT'S GUIDE TO CHOOSING A GUARDIAN

FIVE MAIN QUESTIONS

If the point of an estate plan is to protect our estates for the benefit of the people we leave behind, then the most important thing we can hope to protect with our estate plans is our children. The choice of a guardian for your children can be an emotional one for you as parents to make together. Your children are precious, and your options are limited. It can help get the conversation rolling if you have a roadmap for how to get from start to finish. To help guide you down the road, here are five questions you can ask yourselves.

FACTORS TO CONSIDER

- ✓ Age, marital status, lifestyle
- ✓ Financial status
- ✓ Religions, moral and cultural views
- ✓ Location
- ✓ Household size
- ✓ Your children's needs
- ✓ Will the guardian also be the trustee?

1. WHAT DO YOU KNOW ABOUT EACH CANDIDATE AND HOW WILL IT AFFECT YOUR KIDS?

Think about the factors to consider on the right and make a list for each potential guardian. It may also be important to see if they will need to upgrade their home to accommodate your children. If so, will you help with that financially?

2. DOES YOUR CHILD HAVE SPECIAL NEEDS THAT MIGHT AFFECT THE GUARDIAN'S ABILITY TO CARE FOR THEM?

3. DOES THE PROPOSED GUARDIAN PRACTICE SIMILAR PARENTING METHODS TO YOURS? For example, would they use corporal punishment?

4. ARE YOU GOING TO NAME THE GUARDIAN AS TRUSTEE OF YOUR KIDS' TRUST?

If not, will the guardian work well with your trustee? The role of trustee is very different from that of guardian. One person is the physical caretaker for your children while the other is the custodian of their inheritance. Your trustee will need to work closely with the guardian to ensure that your children's needs are provided—the trustee may need to pay for music lessons and musical instruments or athletic equipment.

5. WILL YOUR CHILDREN OR GUARDIAN NEED TO RELOCATE TO ACCOMMODATE YOUR CHOICE?

This brochure is intended to be educational and should not be treated as legal advice. Always seek the advice of an attorney licensed in your state before making decisions about your estate plan.



ELDER LAW | ESTATE PLANNING | PROBATE | TRUSTS | MEDICAID | VA PENSION

118 SECOND STREET NW | P.O. BOX 123 | ORANGE CITY, IA 51041
(712) 737-3885 | INFO@HUIZENGALAW.COM | WWW.HUIZENGALAW.COM