

Estate Planning Consultation – Satterfield Legal, PLLC

If you are married, we presume your spouse will be your primary designation for all roles.
This form is intended to list any backup designations should your spouse be unable to serve.

Your Name: _____

Healthcare Decisions:

Full Legal Name, Relationship

Address: _____

Tele: _____

Email: _____

Backup:

Full Legal Name, Relationship

Address: _____

Tele: _____

Email: _____

Financial Decisions during Life:

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

EXECUTOR:

*Settles estate
after death*

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

TRUSTEE:

*Long Term
Financial
Planning*

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

Guardian For Minors:

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

Your Spouse's Name: _____

Healthcare Decisions:

Full Legal Name, Relationship

Address: _____

Tele: _____

Email: _____

Backup :

Full Legal Name, Relationship

Address: _____

Tele: _____

Email: _____

Financial Decisions during Life:

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

EXECUTOR:

*Settles estate
after death*

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

TRUSTEE:

*Long Term
Financial
Planning*

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship

Guardian For Minors:

Full Legal Name, Relationship

Backup: _____

Full Legal Name, Relationship