

# Guardian Planning Summary

For reflection and discussion purposes only

This summary is designed to help you organize your thoughts before finalizing legal documents with your attorney. There are no wrong answers. Take your time.

**Child(ren):**

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## Primary Guardian Choice

**Name(s):**

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**Relationship to our child(ren):**

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**Relationship to our child(ren):**

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## Alternate Guardian Choices

### First Alternate

Name(s): \_\_\_\_\_

Relationship: \_\_\_\_\_

### Second Alternate

Name(s): \_\_\_\_\_

Relationship: \_\_\_\_\_

## Our Top Priorities for Our Child(ren)

*(Select or circle 3-5 that matter most to you)*

- Stability and routine
- Emotional warmth, patience, and temperament
- Discipline style and structure
- Education, learning style, and opportunities
- Religious, spiritual, or cultural traditions
- Community, geography, and lifestyle
- Relationships with extended family

You don't need to find a "perfect" guardian. Strong alignment with what matters most to you is what truly counts.

## Notes & Reflections

*Take your time. This section is intentionally open-ended.*

Use this space to capture anything you want your attorney to know or questions you'd like to discuss before finalizing your plan.

**Things we want a guardian to understand about our child(ren):**

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*You don't need to have everything figured out today. This worksheet is a starting point – not a final decision. Final guardian nominations are made through your estate planning documents with your attorney.*

**Concerns, questions, or situations we want guidance on:**

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**Additional notes or reflections:**

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## Ready to Talk it Through?

If you're feeling ready to take the next step—or if you simply want guidance as you think this through—we're here to help.

Our team at **Marsala Law Firm** works with parents every day to turn these reflections into a clear, legally sound plan that protects what matters most.

When you're ready, give us a call at **(669) 800-0810**

