

Section 1: One block per role, first choice and backup

Complete by hand. Copy this page for more candidates for any role. Keep full account numbers, Social Security numbers and passwords off this sheet; a name and a phone number are enough for a working note.

Sheet header

Prepared by

Date prepared

Where I keep this sheet

Person told about this sheet

Section 1: One block per role, first choice and backup (continued)

Role: informal helper (conversation partner or trusted contact)

An informal helper needs no legal document. A trusted contact has no access to your money; the firm calls them only in limited circumstances, such as signs of exploitation.

First choice (name)

How I know them

Asked and willing (yes or no, date asked)

Can act from far away (yes, no, notes)

Backup (name)

Where any related record lives

Review date

Section 1: One block per role, first choice and backup (continued)

Role: health care agent (advance directive)

A health care agent makes health care decisions only when you cannot communicate them yourself. Name an alternate as backup.

First choice (name)

How I know them

Asked and willing (yes or no, date asked)

Can act from far away (yes, no, notes)

Backup (name)

Where any related record lives

Where the directive document lives

Review date

Section 1: One block per role, first choice and backup (continued)

Role: financial agent (power of attorney)

A power of attorney gives the agent a great deal of authority over your finances. Name a successor so a second person can step in.

First choice (name)

How I know them

Asked and willing (yes or no, date asked)

Can act from far away (yes, no, notes)

Backup (name)

Where any related record lives

Where the POA document lives

Review date

Section 1: One block per role, first choice and backup (continued)

Role: trustee (if you have a living trust)

A trustee manages only the money or property in the trust. If you have no trust, write none and move on.

First choice (name)

How I know them

Asked and willing (yes or no, date asked)

Can act from far away (yes, no, notes)

Backup (name)

Where any related record lives

Where the trust document lives

Review date

Section 1: One block per role, first choice and backup (continued)

Role: executor (will)

An executor carries out the directions in your will. Ask the person before you name them, and note a backup candidate here while you decide.

First choice (name)

How I know them

Asked and willing (yes or no, date asked)

Can act from far away (yes, no, notes)

Backup (name)

Where any related record lives

Where the will is kept

Review date

Sources for this sheet: S01, S02. Full citations follow.

Section 2: Benefits designees and document contacts

Social Security and VA payments follow their own appointment process. SSA lets you advance-designate up to three individuals; the VA fiduciary page describes no advance-designation option.

SSA representative payee advance designees

Three slots, in order. Ask each person before you list them.

First designee (name)

Date asked

Notes

Second designee (name)

Date asked

Notes

Third designee (name)

Date asked

Notes

Section 2: Benefits designees and document contacts (continued)

VA fiduciary contact (if you have VA benefits)

A contact line only. VA appoints the fiduciary after a suitability investigation, and its page describes no advance-designation option.

Name

Notes

Who knows where my documents are

If you have no relative or friend you trust for this, a lawyer can be the person who knows where your papers are.

Name

How to reach them

What they know the location of

Section 2: Benefits designees and document contacts (continued)

Duty tests and review, before you file this sheet

No one to ask? The Eldercare Locator at eldercare.acl.gov or 1-800-677-1116 connects you to services for older adults, including money management programs.

Review this sheet at least once a year and after any major life event.

- ☐ Acts in my best interest
- ☐ Keeps my money separate from theirs
- ☐ Keeps records
- ☐ Is willing and able

Review date

Sources for this sheet: S02, S03, S04, S05. Full citations follow.

Fictional example: one completed sheet

Every entry on this page is invented. Names, dates and places are fictional; program names appear as names, never as claims.

Sheet header (fictional)

Prepared by: Dana R. (fictional example)

Date prepared: October 17, 2026 (invented date)

Where I keep this sheet: Kitchen file folder

Person told about this sheet: Walt G. (fictional)

Health care agent row (fictional)

First choice (name): Priya S. (fictional)

How I know them: Friend of 20 years

Asked and willing: Yes; asked March 3, 2026 (invented date)

Can act from far away: Yes; two hours away by train

Backup (name): Walt G. (fictional)

Where any related record lives: Household folder

Where the directive document lives: Signed directive in the household folder; copy filed with the doctor

Review date: Each October

SSA first advance designee (fictional)

First designee (name): Priya S. (fictional)

Date asked: March 3, 2026 (invented date)

Notes: Agreed to serve if the need arises

VA fiduciary contact (fictional)

Name: None yet; Dana has no VA benefits in this example

Notes: Left blank on purpose

Fictional example: one completed sheet (continued)

Who knows where my documents are (fictional)

Name: J. Okafor, lawyer (fictional)

How to reach them: Office number in the household address book

What they know the location of: Will and trust originals

Duty tests checked for Priya S. (fictional)

- ☐ Acts in my best interest
- ☐ Keeps my money separate from theirs
- ☐ Keeps records
- ☐ Is willing and able

Sources and official instructions

[S01] Choosing a Health Care Proxy. National Institute on Aging. Content reviewed October 31, 2022; checked October 17, 2026.

<https://www.nia.nih.gov/health/advance-care-planning/choosing-health-care-proxy>

[S02] Considering a financial caregiver? Know your options. Consumer Financial Protection Bureau. March 2021; checked October 17, 2026.

https://files.consumerfinance.gov/f/documents/cfpb_considering-a-financial-caregiver-know-your-options_guide_2021-05.pdf

[S03] Representative Payee Program. Social Security Administration. Maintained program page; checked October 17, 2026.

<https://www.ssa.gov/payee/>

[S04] VA Fiduciary Program. U.S. Department of Veterans Affairs. Maintained program page; checked October 17, 2026.

<https://www.benefits.va.gov/fiduciary/>

[S05] Getting Your Affairs in Order Checklist: Documents to Prepare for the Future. National Institute on Aging. Content reviewed February 1, 2023; checked October 17, 2026.

<https://www.nia.nih.gov/health/advance-care-planning/getting-your-affairs-order-checklist-documents-prepare-future>