



ESTATE PLANNING · CLIENT WORKSHEET

People I Trust: Executor, Agents & Guardians

A complete plan names the people who can act for you, both during life and after. A statutory durable power of attorney covers finances; a medical power of attorney and a directive to physicians cover health care; and your will names an executor and, if you have minor children, a guardian.¹

◆ Executor (carries out your will)

First choice⁴

Alternate

◆ Agent for finances (durable power of attorney)

First choice¹

Alternate

◆ Agent for health care (medical power of attorney)

First choice²

Alternate

◆ Guardian for minor children (if applicable)

First choice

Alternate

◆ Notes

Anything the attorney should know about these choices

REFERENCES & SOURCES

1. Tex. Est. Code §§ 751.001, 752.051 (Durable Power of Attorney Act; statutory durable power of attorney form). statutes.capitol.texas.gov
2. Tex. Health & Safety Code §§ 166.151–166.164 (medical power of attorney). statutes.capitol.texas.gov
3. Tex. Health & Safety Code § 166.033 (Directive to Physicians and Family or Surrogates). statutes.capitol.texas.gov
4. Tex. Est. Code § 304.001 (order of persons qualified to serve as executor or administrator). statutes.capitol.texas.gov
5. Texas Law Help, "Wills, Estate Planning and Probate." texaslawhelp.org

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