

Memorandum of Intent



Our Intent

This Memorandum provides guidance to the guardian of a minor family member with respect to family member rearing practices, important choices and our wishes regarding the family member's care. This memorandum is to be considered binding to the extent possible. However, we recognize that there may be circumstances that we cannot anticipate, so we request that all parties concerned act in accordance with our intent as set forth in this memorandum. We appoint the guardian of the minor family member to carry out our wishes and desires as expressed herein. We direct our trustee to support the family member's guardian to the greatest extent possible in honoring these instructions.

Our estate plan uses a Revocable Living Trust, Pour-over Will, and other documents. Should this memorandum conflict with any provision of our primary estate planning documents, i.e. our Revocable Living Trust or Pour-over Will, our Revocable Living Trust shall take precedence followed by our Pour-over Will.

Immediate Family and Friends

We are providing the following information so that our family, friends and organizations with whom our family member is affiliated may notify the following **family members** of our death or incapacity, as soon as practicable:

Please notify the following **friends** of our death or incapacity as soon as practicable:

Please notify the following **organizations** of our death or incapacity, as soon as practicable:

Miscellaneous instructions:

Important Information About Our Family

Family Member's Name: _____

Date of Birth: _____

Place of Birth: _____

Primary Physician(s) (or the location of our family member's medical records):

Medical conditions and required treatments:

Therapist(s):

1. Name of therapist: _____

Type of Therapy: _____

Frequency of Therapy: _____

2. Name of Therapist _____

Type of Therapy: _____

Frequency of Therapy: _____

3. Name of therapist: _____

Type of Therapy: _____

Frequency of Therapy: _____

4. Name of Therapist _____

Type of Therapy: _____

Frequency of Therapy: _____

Our Family member attends the following school and extracurricular programs:

(Please use extra paper to include other family members).

Religion and Spirituality

Our family member have been raised in the following religion or tradition:

It is important to us that the family member:

- Continue to receive education in the religion above
- Be free to learn and follow their own conscience with regard to religion and spirituality
- Observe the following holidays:

Participate in the following religious community:

Education

We strongly prefer that our family member attends:

Public School

- The local public school
- The following public school: _____

Private School

- Private School name of school: _____

If not available, we would like the family member to attend:

- a similar parochial private school
- classical private education (academic programs)
- family member-led private school (Waldorf, Montessori)
- the guardians homeschool, if any

In selecting and monitoring the family member's educational experience, it is important to us that:

The guardian be closely involved in the family member's education by:

- attending all conferences
- attending most family activities
- volunteering at our family member's school
- visiting our family member's school unannounced

The guardian helps the family member develop educationally by

- discussing all report cards carefully
- rewarding educational success
- helping our family member to identify his/her interests and to pursue them inside or outside of a classroom
- rounding out our family member's education by providing opportunities outside of the classroom to enjoy:
 - Nature
 - cultural events and places
 - national travel
 - international travel

Discipline

It is important to us that our family member be disciplined in a manner consistent with our values and family member-rearing practices.

We believe that a family member should not be punished for developmentally appropriate behaviors. Rather, we prefer that our guardian use distraction, redirection, negotiation or another non-punitive method of modifying our family member's behavior so that the guardian and our family member can live together in peace.

The following methods of discipline are totally unacceptable to us, and if our guardian feels he or she requires these methods, we wish that person to decline to accept guardianship of the family member.

The following methods of discipline are those we use most frequently because we believe they are appropriate and effective:

Personal Resources

The following resources (books, organizations, etc) have been helpful to me as I've developed as a person. We encourage our family member's guardian to consider these resources for himself or herself:

Miscellaneous Instructions

Date this _____ day of _____, 20__.
