

Template: My Key People Roster

Date Completed: _____

Review Date: _____

Role	Primary Choice (Name & Contact)	Backup Choice (Name & Contact)	Have They Agreed? (Yes/No)	Date Discussed
Attorney (for Finances)	Name: _____ Phone: _____	Name: _____ Phone: _____		
Guardian (for Health)	Name: _____ Phone: _____	Name: _____ Phone: _____		
Executor (for my Will)	Name: _____ Phone: _____	Name: _____ Phone: _____		

Purpose: This is an easy-to-use template for your Key People Roster. It allows listing primary and backup choices for important legal roles, tracking their agreement, and noting discussion dates.

Instructions:

- Discuss each role with the chosen individuals to confirm their understanding and willingness to accept.
- Record "Yes" or "No" in the agreement column to track consent.
- Note the date when the conversation took place to maintain an updated record.
- Keep this roster accessible and review regularly to ensure all details remain current.

This template aids discussion and formalisation of critical legal roles ensuring clarity and preparedness.

Disclaimer: This template is for informational purposes only and does not constitute professional advice. We do not guarantee the accuracy or reliability of its information or calculations.

Your use of this tool is at your own risk, and we are not responsible for any resulting loss or damage. This tool does not consider your personal situation, so you must consult a qualified professional for advice tailored to your needs.

