

THE MORTALITY MENTOR

Helping you navigate life's transitions with confidence.

WHY THIS MATTERS

Legal documents are important - but they are not enough. When life changes, the right people, in the right roles, with the right information, make all the difference. This worksheet helps you identify your people, their roles, and how to reach them quickly.

PEOPLE: YOUR SUPPORT TEAM

You don't have to have a big network - just a clear plan. List the people who may step in to help and what they'll need to know.

EXAMPLES OF ROLES

Decision-Makers (Legal, Medical, Financial)	Professional Advisors (Attorney, Financial Advisor, CPA, etc.)	Practical Helpers (Daily Money Manager, Care Manager, Home Helper, etc.)	Care & Support Network (Neighbors, Friends, Faith Community)	Personal Circle (Family, Friends, Other People Who Care)
---	--	--	--	--

MY SUPPORT TEAM

ROLE / CATEGORY (Examples Above)	NAME	HOW THEY HELP / ROLE	WHEN TO CONTACT	BEST WAY TO CONTACT	HAVE YOU ASKED THEM?	NOTES
DECISION-MAKERS						
Healthcare Decision Maker (Healthcare POA)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Financial Decision Maker (Financial POA)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Executor / Trustee (After-Death Responsibilities)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Attorney (Estate Planning)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
PROFESSIONAL ADVISORS						
Financial Advisor (Investments, Planning)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Accountant / Tax Professional					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Insurance Professional (Life, LTC, Disability)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
PRACTICAL HELPERS						
Daily Money Manager (Bill Pay, Organization)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Care Manager / Patient Advocate (Care Coordination)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Home & Property Helper (Keys, Mail, Maintenance)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
CARE & SUPPORT NETWORK						
Neighbor / Friend (Local Support)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Faith Community Contact					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Other Support Contact (Local Resources)					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
PERSONAL CIRCLE						
Family Member / Friend					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Family Member / Friend					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Family Member / Friend					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	
Family Member / Friend					<input type="checkbox"/> Yes <input type="checkbox"/> Not Yet	

TIP: You don't need one person to do it all. Different people can play different roles - and that's okay.

THINGS TO REMEMBER

- Review this list once a year or whenever life changes.
- Keep your people updated if contact information changes.
- Thank your support team and share this with them.
- Store a copy where it can be found.

QUICK CHECK: HAVE YOU...

- Talked with each person about their role?
- Confirmed they are willing and able?
- Shared where they can find important information?
- Let them know how you prefer to be supported?

YOU DON'T HAVE TO DO THIS ALONE

- There are professional and community resources whose job is to help - often at no cost to you.
- Asking for help is one of the most powerful ways to protect your future.

Legal documents name who can act on your behalf. **Conversations prepare them to do it.**