

ESTATE PLANNING

Guidelines for Guardians Checklist

The following checklist contains some of the key issues you should consider when forming a set of instructions or wishes to the person(s) appointed as guardian of your children. As there are no limits or rules on what can be included or excluded, there may be additional issues which you may consider important enough to record in your own document.

1. General context in which this document applies

- Parents have only one child when preparing document?
- Separation – one parent preparing document?

2. Guardians

- Who appointed?
- Why?

3. Children's home

- Where to reside?
- With whom?
- Why?

4. Involvement of other family members in children's upbringing

- Who?
- To what degree?
- Nature of involvement?

5. Other people we/I would like to be involved in children's lives

- Who?
- Why?
- Nature of involvement?

6. Standard of living

- The same level as those with whom they will live?
- Different requirements?

7. Lifestyle

- General lifestyle expectations to be experienced or encouraged?

8. Religious instruction

- In which faith?
- To what degree?

9. Family cultural/traditional values

- What are they?
- Should they be encouraged or discouraged?

10. Primary school education

- Which school?
- Are children already enrolled to attend?

11. Secondary school education

- Which school?
- Are children already enrolled to attend?

12. School reports

- Who should receive copies? (With children's approval?)

13. Exchange student

- Wish child to be involved?
- Preferred or non-preferred countries or regions?

14. Tertiary education

- Tertiary education to be encouraged or not encouraged?
- Preferred institution?
- Preferred course/s or studies?

15. General development

- Sports, hobbies and interests to be fostered.

16. Pocket money

- To be received?
- How much?

17. Part-time employment

- To be encouraged?

18. Other activities to be encouraged at school age

- Girl guides/scouts?
- Music?
- Pets?
- Recreational activities?

19. Equipment/facilities

- Computers?
- Mobile phone?
- Any other?

20. Overseas trips

- What type?
- When or where?

21. Coaching and tuition

- In what?
- Under what circumstances?

22. Health

- Medical insurance cover?
- Screening or early detection tests?
- Sun protection?

23. Personal development

- Character issues and self esteem

24. Establishing his/her/their own home

- Right to do?
- When?

25. Additional issues

- Drugs
- Special family mentor?
- Liaison with teachers and parent representatives?

26. Flexibility

- A broad acknowledgment that the matters mentioned in the document need to be subject to a certain degree of flexibility as the wishes of the parents may not 'mirror' those of the child/children.

27. Children's access to this document

- If and when?

This publication is for information only and is not legal advice. You should obtain advice that is specific to your circumstances and not rely on this publication as legal advice. If there are any issues you would like us to advise you on arising from this publication, please let us know.