

Vincent J. Russo & Associates, P.C.



*Long Island's Signature
Elder Law, Special Needs & Estate Planning
Law Firm*

“Our Experience is Your Protection”

MEMORANDUM OF INTENT

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MEMORANDUM OF INTENT

Our Intent

This Memorandum provides guidance to the guardian of our children with respect to child rearing practices, important choices and our wishes regarding our children'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 our minor children to carry out our wishes and desires as expressed herein. We direct our trustee to support our guardian to the greatest extent possible in honoring these instructions.

Our estate plan may utilize a [Revocable] Living Trust and Pour-over Will and/or a Last Will and Testament, and other documents. Should this memorandum conflict with any provision of our primary estate planning documents, our Revocable Living Trust and/or Last Will and Testament shall take precedence.

Immediate Family and Friends

We are providing the following information so that our family, friends and organizations with whom our family is affiliated may be notified of our children's new guardianship and invited to participate in our children's lives.

Upon our children's being placed in a guardian's custody, please notify the following family members of our death or incapacity, and of the location of our children as soon as practicable:

NAME:	TELEPHONE NUMBER:

Upon our children's being placed in a guardian's custody, please notify the following friends of our death or incapacity, and of the location of our children as soon as practicable:

NAME	TELEPHONE NUMBER:

Upon our children's being placed in a guardian's custody, please notify the following organizations of our death or incapacity, and of the location of our children as soon as practicable:

NAME	TELEPHONE NUMBER:

Miscellaneous instructions:

Important Information About Our Child(ren)

(NOTE: Make a copy of this section for each child)

Child's Name: _____

Child's Date of Birth: _____

Child's Place of Birth: _____

Our Child's Primary Physician(s) (or the location of our child's medical records):

Our Child has the following medical conditions and requires the following treatments:

Our Child's Therapist(s):

- None (check box if none)

Name of Therapist _____

Type of Therapy _____

Frequency of Therapy _____

Name of Therapist _____

Type of Therapy _____

Frequency of Therapy _____

Name of Therapist _____

Type of Therapy _____

Frequency of Therapy _____

Name of Therapist _____

Type of Therapy _____

Frequency of Therapy _____

Our Child attends the following school and extracurricular programs:

Religion and Spirituality

Our children have been raised in the following religion or tradition:

It is important to us that our children:

- ___ 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 children attend:

___ public school

___ the local public school

___ the following public school: _____

___ private school

name of school: _____

if not available, we would like our children to attend a similar

___ parochial private school

___ classical private education (academic programs)

___ child-led private school (Waldorf, Montessori)

___ the guardian's home school, if any

___ Religious after school lessons

In selecting and monitoring our children's educational experience, it is important to us that:

___ The guardian be closely involved in our children's education by:

___ attending all conferences

_____ attending most family activities

_____ volunteering at our child's school

_____ visiting our child's school

_____ The guardian helps our children develop educationally by

_____ discussing all report cards carefully

_____ rewarding educational success

_____ helping our child to identify his/her interests and to pursue them inside or outside of a classroom

_____ rounding out our child'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 child be disciplined in a manner consistent with our values and child-rearing practices.

We believe that a child 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 child's behavior so that the guardian and our child 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 our children.

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

Parenting Resources

The following resources (books, organizations, etc) have been helpful to me as we have developed our parenting philosophy. We encourage our child's guardian to consider these resources for himself or herself:

Professionals

Legal Counsel:

Financial Planner

Insurance Agent

Accountant

Other

Miscellaneous Instructions

Dated: _____

If you have any questions regarding this Memorandum of Intent or require legal advice, the law firm of Vincent J. Russo & Association, P.C. is available to help.

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& Associates, P.C.



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