

# Vincent J. Russo & Associates, P.C.



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

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**“Our Experience is Your Protection”**

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## 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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