

MEMORANDUM OF INTENT

for my Sibling

My Intent

This Memorandum provides guidance to the guardian of a sibling with respect to the siblings rearing practices, important choices and my wishes regarding my siblings' care. This memorandum is to be considered binding to the extent possible. However, I recognize that there may be circumstances that I cannot anticipate, so I request that all parties concerned act in accordance with my intent as set forth in this memorandum. I appoint the guardian of my sibling to carry out my wishes and desires as expressed herein. I direct my trustee to support my guardian to the greatest extent possible in honoring these instructions.

My 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 my primary estate planning documents, My Revocable Living Trust and/or Last Will and Testament shall take precedence.

Immediate Family and Friends

I am providing the following information so that My family, friends and organizations with whom My family is affiliated may be notified of My siblings' new guardianship and invited to participate in My siblings lives.

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

NAME:	TELEPHONE NUMBER:

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

NAME	TELEPHONE NUMBER:

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

NAME	TELEPHONE NUMBER:

Miscellaneous instructions:

Important Information about My Sibling

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

Sibling's Name:

Sibling's Date of Birth:

Sibling's Place of Birth: _____

My Sibling's Primary Physician(s) (or the location of my sibling's medical records):

My Sibling has the following medical conditions and requires the following treatments:

My Sibling'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 _____

My Sibling attends the following school and extracurricular programs:

Religion and Spirituality

My siblings have been raised in the following religion or tradition:

It is important to me that my sibling:

- 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

I strongly prefer that my sibling attend:

- public school
 - the local public school
 - the following public school: _____

- private school
 - name of school: _____

if not available, I would like my sibling to attend a similar

- parochial private school

- classical private education (academic programs)
- sibling-led private school (Waldorf, Montessori)
- the guardian's home school, if any
- Religious after school lessons

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

- The guardian be closely involved in my sibling's education by:
 - attending all conferences
 - attending most family activities
 - volunteering at my sibling's school
 - visiting my sibling's school
- The guardian helps my siblings develop educationally by
 - discussing all report cards carefully
 - rewarding educational success
 - helping my sibling to identify his/her interests and to pursue them inside or outside of a classroom
 - rounding out my sibling'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 my sibling be disciplined in a manner consistent with my values and sibling-rearing practices.

I believe that a sibling should not be punished for developmentally appropriate behaviors. Rather, I prefer that my guardian use distraction, redirection, negotiation or another non-punitive method of modifying my sibling's behavior so that the guardian and my sibling can live together in peace.

The following methods of discipline are totally unacceptable to us, and if my guardian feels he or she requires these methods, I wish that person to decline to accept guardianship of my siblings.

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

Parenting Resources

The following resources (books, organizations, etc) have been helpful to me as I have developed my parenting philosophy. I encourage my sibling'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 Russo Law Group, P.C. is available to help.