



ROSS ESTATE LAW
GUARDIANSHIP
PLANNING WORKBOOK FOR PARENTS





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This Guardianship Planning Workbook for Parents is a guide for documenting your wishes, values and vision for your child's future.

This workbook includes a Guardianship Planning Checklist. Use this checklist to organize all critical legal, personal, medical financial and educational information that a guardian will need to care for your child.

The workbook also includes questions for you to consider in five areas: core values & life goals; discipline & behaviour; daily life & routine; emotional & mental health; and financial matters. Please take the time to answer as many questions as possible. We recommending reviewing and revising this document on an annual basis.



GUARDIANSHIP PLANNING CHECKLISTS

LEGAL, PERSONAL & MEDICAL INFORMATION
EMERGENCY CONTACT LIST
MEDICAL PROVIDERS LIST
FINANCIAL INFORMATION

EDUCATION AND DAILY LIFE INFORMATION

QUESTIONS FOR CONSIDERATION

CORE VALUES & LIFE GOALS
DISCIPLINE & BEHAVIOUR
DAILY LIFE & ROUTINE
EMOTIONAL & MENTAL HEALTH
FINANCIAL MATTERS
UNIQUE CONSIDERATIONS

PLANNING CHECKLIST

LEGAL, PERSONAL & MEDICAL INFORMATION

	NOTES
<input type="checkbox"/> Copy of child's birth certificate	
<input type="checkbox"/> Guardianship agreement or court order(s) specifying custody arrangements	
<input type="checkbox"/> Social security number or other government-issues ID numbers	
<input type="checkbox"/> Emergency contact list	
<input type="checkbox"/> Names and contacts of child's primary doctor and any health care providers	
<input type="checkbox"/> Description of medical conditions, allergies or special needs	



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PLANNING CHECKLIST

FINANCIAL INFORMATION

	NOTES
<input type="radio"/> List all bank accounts, investments and outstanding debts on Financial Information List	
<input type="radio"/> List inventory of property, vehicles and significant personal belongings in Assets Inventory	
<input type="radio"/> Location and access instructions for legal documents including wills, trusts, insurance, & titles. See below Access to Documents List	



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FINANCIAL INFORMATION LIST

LIST BANK ACCOUNTS, INVESTMENTS
AND OUTSTANDING DEBTS HERE

NOTES

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ASSETS INVENTORY

LIST PROPERTY, VEHICLES AND
SIGNIFICANT PERSONAL BELONGINGS
HERE

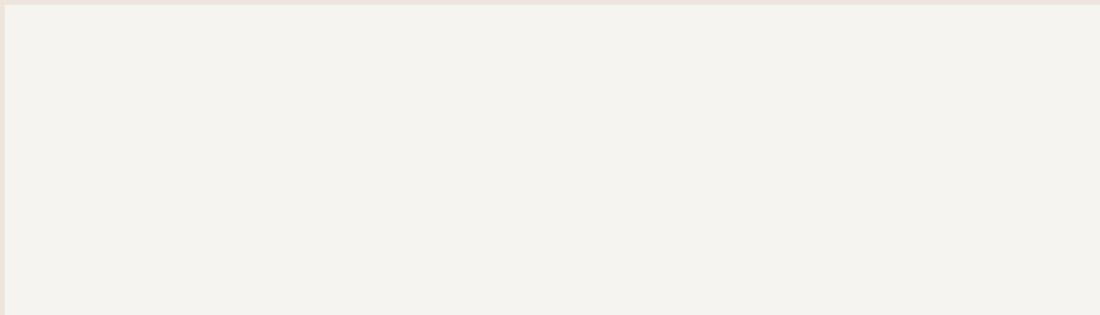
NOTES

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ACCESS TO DOCUMENTS

PROVIDE LOCATION AND ACCESS
INSTRUCTIONS FOR WILLS, TRUSTS,
INSURANCE, TITLES AND OTHER CRITICAL
DOCUMENTS HERE

NOTES



PLANNING CHECKLIST

EDUCATIONAL & DAILY LIFE INFORMATION

	NOTES
<input type="checkbox"/> Name and contact details for the child's school	
<input type="checkbox"/> Instructions for daily transportation (to/from school)	
<input type="checkbox"/> Report cards or progress reports	
<input type="checkbox"/> Copies of special education documents (if applicable)	
<input type="checkbox"/> List of clubs, sports, and activities the child is involved in	
<input type="checkbox"/> Contact information for coaches, instructors, or program leaders	

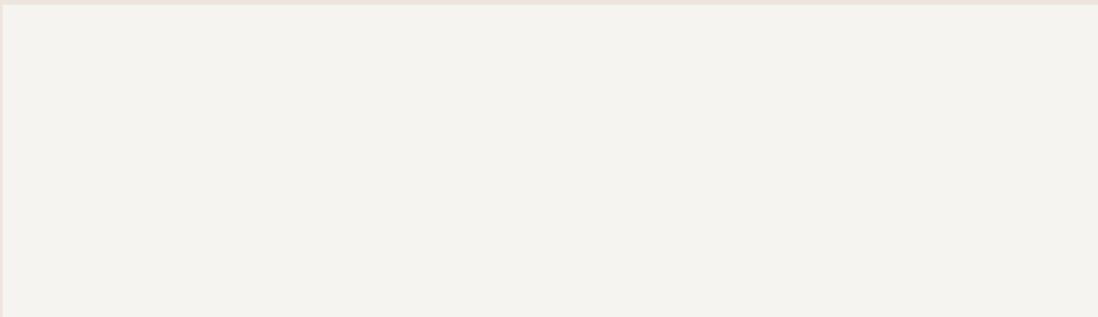


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EDUCATION INFORMATION

PROVIDE INSTRUCTIONS FOR DAILY
TRANSPORTATIONS TO AND FROM SCHOOL
ALONG WITH A LIST OF ALL CLUBS, SPORTS
AND ACTIVITIES THE CHILD IS INVOLVED IN.

NOTES



CORE VALUES & LIFE GOALS QUESTIONNAIRE

A GUIDE TO DOCUMENTING YOUR WISHES, VALUES AND
VISION FOR YOUR CHILD'S FUTURE.
QUESTIONS TO CONSIDER (SPACE PROVIDED BELOW TO
ANSWER QUESTIONS YOU WANT INCLUDED)

CORE VALUES

What kind of person do you hope your child will become as an adult? What qualities do you want them to embody?

WHAT CHARACTER TRAITS DO YOU VALUE MOST?

For example: kindness, honesty, resilience

RELIGION AND SPIRITUALITY

How do you want the guardian to handle your child's religious or spiritual upbringing?

PHILOSOPHY ON EDUCATION

What is your philosophy on education? Private/ public/
homeschool/ other?

CORE VALUES & LIFE GOALS
QUESTIONNAIRE

A GUIDE TO DOCUMENTING YOUR WISHES, VALUES AND
VISION FOR YOUR CHILD'S FUTURE
QUESTIONS TO CONSIDER:

CULTURE & HERITAGE

How important is your child's connection to their cultural heritage?
What cultural customs or practices should the guardian continue?

**WHAT ROLE SHOULD YOUR EXTENDED
FAMILY PLAY IN YOUR CHILD'S LIFE?**

Include wishes about grandparents, aunts, uncles, cousins, etc.



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CONCLUSION

CONGRATULATIONS ON FINISHING THE WORKBOOK

Completing this Guardianship Planning Workbook is an important step in securing your child's future. By sharing your values, wishes, and essential information, you're helping ensure your child is cared for in a way that reflects your intentions.

We recommend reviewing and updating this document annually to keep it current. Before you finish, use the checklist below to make sure everything is in place:

Checklist for Parents:

- Have you chosen a legal guardian and discussed this workbook with them?
- Have you included this workbook with your will or estate plan?
- Have you reviewed this document with your partner or co-parent?
- Have you reviewed and updated this workbook in the past year?

A little planning now provides lasting peace of mind for you—and meaningful guidance for your child's future.