

MANAGEMENT OF AN ESTATE PLAN

Following is a summary of various management roles involved in an estate plan:

Role	Document Name	What They Manage?	When They Manage?
Trustee	Declaration of Trust or Trust Agreement	Trust assets	Both during your incapacity and after your death
Executor	Will or Pour Over Will	<ul style="list-style-type: none"> • Non-trust assets • Funeral wishes 	Only after your death
Financial Agent	Financial Power of Attorney	Access your financial records and make your financial decisions	Only during your incapacity
Health Care Agent	Health Care Power of Attorney	Make your medical decisions	Both during your incapacity and after your death
HIPAA Agent	HIPAA Release & Authorization	Access your medical records	Both during your incapacity and after your death
Guardian	Will		Only after your death
	Guardianship Declaration	Minor child(ren)	Both during your incapacity and after your death