

## Worksheet: Choosing Your Financial Advocate

Choosing your financial advocate is the first step towards making sure your money is safe and spent the way you want. Even if you never need an advocate to step in, you'll know they are there if you need them.

Use this worksheet to help you think through who your first choice is and who you would like as an alternate or back-up financial advocate. We've included a checklist of important qualities. The **highlighted** qualities are essential. The remaining ones are also important, but your advocate might not have them all.

<b>The name of your top candidate to be your financial advocate:</b> _____	Do they have this quality?	<b>Name of your candidate to be your alternate / back-up advocate:</b> _____	Do they have this quality?
<b><i>Trustworthy</i></b>	<input type="checkbox"/>	<b><i>Trustworthy</i></b>	<input type="checkbox"/>
<b><i>Honest</i></b>	<input type="checkbox"/>	<b><i>Honest</i></b>	<input type="checkbox"/>
<b><i>Loyal</i></b>	<input type="checkbox"/>	<b><i>Loyal</i></b>	<input type="checkbox"/>
<b><i>Available and reliable</i></b>	<input type="checkbox"/>	<b><i>Available and reliable</i></b>	<input type="checkbox"/>
<b><i>No legal problems</i></b>	<input type="checkbox"/>	<b><i>No legal problems</i></b>	<input type="checkbox"/>
<b><i>No serious mental health or addiction issues</i></b>	<input type="checkbox"/>	<b><i>No serious mental health or addiction issues</i></b>	<input type="checkbox"/>
<b><i>Good with their own money</i></b>	<input type="checkbox"/>	<b><i>Good with their own money</i></b>	<input type="checkbox"/>
Good listener and communicator	<input type="checkbox"/>	Good listener and communicator	<input type="checkbox"/>
Financially savvy	<input type="checkbox"/>	Financially savvy	<input type="checkbox"/>
Understands you and your needs	<input type="checkbox"/>	Understands you and your needs	<input type="checkbox"/>
Smart decision-maker	<input type="checkbox"/>	Smart decision-maker	<input type="checkbox"/>

One more question: Is at least one of your proposed advocates younger in age than you?

Yes

No

It's smart to have at least one of your advocates be younger than you. This helps ensure that they are healthy enough and available to assist you in the future.

**If you are having trouble thinking of someone who is right for this role,** there are professionals who can serve as your advocate. Read about these options in Step 1 of the Thinking Ahead Roadmap, and check out the handout on *aging solo* found here <https://thinkingaheadroadmap.org/downloads/>.