

To build your trusted team, start by identifying the types of jobs or roles that will help you manage your financial assets, make decisions related to lifestyle and health care, handle legal matters, and monitor decision-making capabilities.

Next, identify a specific individual for each role. Implement a checks-and-balances strategy to ensure that team members give each other feedback and communicate regularly.

Job or Role	Responsibilities	Name of Team Member
<i>Example: Bill payer</i>	<ul style="list-style-type: none"> <li>• <i>Review bills and payments</i></li> <li>• <i>Reconcile accounts</i></li> </ul>	<i>John</i>
<i>Example: Health care</i>	<ul style="list-style-type: none"> <li>• <i>Research health care provider and issues</i></li> <li>• <i>Review insurance coverage and authorize medical bill payments</i></li> <li>• <i>Monitor prescriptions</i></li> </ul>	<i>Nancy</i>