



MEMORANDUM OF INTENT for our Child

(Name)

Our Intent

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

Our estate plan utilizes various estate planning documents such as a Revocable Living Trust, Pour-over Will, and/or other documents. Should this memorandum conflict with any provision of our primary estate planning documents, i.e. Revocable Living Trust or Pour-over Will, our Revocable Living Trust shall take precedence followed by our Pour-over Will.

Immediate Family and Friends

We provide the following information so that our family, friends and organizations with whom our family is affiliated may be notified of our child's new guardianship and invited to participate in our child's life.

Upon our child's placement in a guardian's custody, please notify the following **family members** of our death or incapacity, and of the location of our child as soon as practicable:



Upon our child's placement in a guardian's custody, please notify the following **friends** of our death or incapacity, and of the location of our child as soon as practicable:

Upon our child's placement in a guardian's custody, please notify the following **organizations** of our death or incapacity, and of the location of our child as soon as practicable:

Miscellaneous instructions:



Important Information About Our Child

Child's Name: _____

Child's Date of Birth: _____

Child's Place of Birth: _____

Our Child's Primary Physician(s) (or the location of our child's medical records):

Our Child has the following medical conditions and requires the following treatments:

Our Child's Doctors(s):

Name of Physician _____

Contact Information _____

Type of Practice _____

Name of Physician _____

Contact Information _____

Type of Practice _____

Name of Physician _____

Contact Information _____

Type of Practice _____



Name of Physician _____

Contact Information _____

Type of Practice _____

Our Child's Therapist(s):

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 _____



Our Child attends the following school and extracurricular programs:

Religion and Spirituality

Our child has been raised in the following religion or tradition:

It is important to us that our child:

- continue to receive education in the religion above
- be free to learn and follow his/her own conscience with regard to religion and spirituality
- observe the following holidays:

- participate in the following religious community:



Education

We strongly prefer that our child attend:

- public school
 - the local public school
 - the following public school: _____
- private school
 - name of school: _____
 - if not available, we would like our child to attend a similar
 - parochial private school
 - classical private education (academic programs)
 - child-led private school (Waldorf, Montessori)
 - the guardian's home school, if any

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

- The guardian be closely involved in our child's education by:
 - attending all conferences
 - attending most family activities
 - volunteering at our child's school
 - visiting our child's school unannounced
- The guardian helps our child develop educationally by
 - discussing all report cards carefully
 - rewarding educational success



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

Parenting Resources

The following resources (books, organizations, etc.) have been helpful to us as we have developed our parenting philosophy. We encourage our child's guardian to consider these resources for himself or herself:

Professionals

Legal Counsel:

Financial Planner:



Miscellaneous Instructions:

Dated: _____

NOTE: The above is merely informational and not legal advice. This Memorandum of Intent was published in January 2026 and is based upon New York law. You should contact RUSO LAW GROUP, P.C., for any changes or updates in your estate planning or the law. Future changes in the law may render the above information inaccurate.

If you have any questions regarding this Memorandum of Intent or require legal advice, please do not hesitate to call RUSO LAW GROUP, P.C. at (516) 683-1717 or contact us at www.VJRussoLaw.com.

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