

Power of Attorney

NAME: _____

ADDRESS: _____

PHONE #: (____) _____ - _____

EMAIL: _____

APPOINTMENT OF AGENT

AGENT NAME: _____

AGENT ADDRESS: _____

AGENT PHONE #: _____ RELATIONSHIP: _____

APPOINTMENT OF AN ALTERNATE AGENT

AGENT NAME: _____

AGENT ADDRESS: _____

AGENT PHONE #: _____ RELATIONSHIP: _____

Will the alternate agent have all the same powers as the appointed agent? Y N

AGENT POWERS

1. Banking and Financial Power

- | | | | |
|----|---|---|---|
| a. | Deposit funds into any bank or trust company in my name <u>or</u> my agent's name? | Y | N |
| b. | Withdraw funds from any financial institution in my name or my agent's name? | Y | N |
| c. | Access and transact business with any account that I may hold jointly with <u>other</u> people? | Y | N |
| d. | Endorse notes or checks that would, otherwise, require my endorsement? | Y | N |
| e. | Borrow funds to mortgage any real property? | Y | N |
| f. | Access to any safe deposit box, in my name or jointly in my name, to add or remove any of its contents? | Y | N |
| g. | Pay all debts hereafter incurred by <u>us</u> ? | Y | N |
| h. | Open any financial account with any financial institution for any purpose or create a lifetime trust or my benefit? | Y | N |
| i. | Change the beneficiary of an existing trust in my name? | Y | N |

2. Stocks, Bonds, Securities, and Investments Power

- | | | | |
|----|--|---|---|
| a. | Sell, exchange, pledge, assign, transfer or deliver to <u>any</u> person, all or part of any stocks, bonds, notes, interests in partnerships or other securities in my name? | Y | N |
| b. | Register or transfer any or all of my securities into my agent's name? | Y | N |
| c. | Vote my securities in person or by proxy? | Y | N |
| d. | To transact all business in relation to any stocks, bonds, securities, annuities or other property in the nature thereof? | Y | N |
| e. | Invest any form of property, funds and securities held or received for me at agent's discretion? | Y | N |

3. Real and Personal Property Powers

- | | | | |
|----|---|---|---|
| a. | <u>Sell, exchange, pledge, assign, transfer and deliver to any person</u> , all or any part of real property in my name, or that I may have any joint interest? | Y | N |
| b. | Make, execute, and deliver necessary deeds, assignments or transfers? | Y | N |
| c. | Operate real property, separately or jointly with others? | Y | N |
| d. | Lease any real property, for any term, at my agent's discretion? | Y | N |
| e. | Alter, repair, improve, divide, exchange any real property? | Y | N |
| f. | Buy any property which I hold a mortgage to at a judicial sale? | Y | N |
| g. | <u>Sell, exchange, pledge, assign, transfer and deliver to any person</u> , any and all | | |

personal property in my name, or which I may have any joint interest? Y N

h. To transact all business and to exercise all rights of management and ownership relating to real property at my agent's discretion? Y N

i. May disclaim my right to any and all real or personal property? Y N

4. Claims, Law Suits, Compromises and Settlements

a. Demand, levy, collect, or sue for any monies or property now or which may become due us from any source whatsoever? Y N

b. Join with other parties in the compromise or settlement of any claims? Y N

c. Make, negotiate, sign and perform any and all agreements and contracts now or hereafter by me if the agent feels it is in my best interest or advantage to do so? Y N

d. Employ attorneys at law, other agents, employees or representatives as my agent may think proper for any obligation that I now or may hereafter become liable? Y N

5. Benefit Plan Powers

a. Apply for and receive any government, insurance, and retirement benefits on my behalf? Y N

b. Liquidate my assets to become eligible for needs-based governmental programs? Y N

c. Terminate, borrow and receive cash value for any of said benefits? Y N

d. Change beneficiaries or transfer ownership of said benefits? Y N

e. May create or change rights of survivorships. Y N

f. May disclaim my right, or transfer my right, as a beneficiary?
(Survivor benefit under another person's retirement plan) Y N

7. Tax Matters

a. Prepare, execute and file on my behalf and in my name any and all income tax declarations and returns? Y N

b. Authority to act on my behalf with any federal, state or local tax agency for any and all years? Y N

8. Power to Delegate

- | | | | |
|----|--|---|---|
| a. | My agent may delegate their authority to another person as they see necessary? | Y | N |
| b. | If more than one person is named as an agent, one or the other may act on my behalf without consultation with the other? | Y | N |

MY EXPECTATIONS

1. Records

- | | | | |
|----|--|---|---|
| a. | Must keep my funds separate from agent's funds? (Unless already jointly held, or my agent is my spouse) | Y | N |
| b. | Keep detailed records of receipts, deposits, withdrawals, transfers, purchases, disbursements, and any real or personal property transactions? | Y | N |
| c. | Disclosed to me annually while I am still alive? | Y | N |
| d. | Only be disclosed to those who will inherit my estate after my death?
If so, who?

_____ | Y | N |
| e. | Only be disclosed after my death? | Y | N |
| f. | Disclosed to third parties who may or may not have an interest in my estate? | Y | N |
| g. | Disclosed if the agent fails to serve in my best interests? | Y | N |

2. Personal Interests

- | | | | |
|----|--|---|---|
| a. | I want my agent to be generous in spending my funds to allow me to maintain the style of living that I am accustomed to? | Y | N |
| b. | The amount my heirs will inherit is of less concern than maintaining my lifestyle? | Y | N |
| c. | I want to continue living in my home for as long as possible? | Y | N |
| d. | I want in-home nurse care, therapy, and long-term nursing even if it is more costly than an assisted living facility? | Y | N |
| e. | I want to continue providing the financial support that I am currently providing to certain family members/friends? If so, who, when, how much?

_____ | Y | N |

f. I want to maintain a certain amount of assets for those who will inherit my estate? Y N
If so, how much should the agent preserve for my heirs?

g. I want my estate plan to be preserved the way that I currently have it set? Y N