

Power of Attorney – Fiduciary Selection Worksheet

Use this worksheet to help evaluate potential agents (fiduciaries) for your Power of Attorney. Complete one section for each person you are considering.

Candidate Name: _____

Relationship to You: _____

Phone / Email: _____

Compensation: _____

Evaluation Questions (Rate 1–5 or add notes):

Trustworthy and honest: Rating _____ Why this rating? _____

Financially responsible: Rating _____ Why this rating? _____

Good judgment under stress: Rating _____ Why this rating? _____

Organized / good with details: Rating _____ Why this rating? _____

Communicates well with others: Rating _____ Why this rating? _____

Available when needed: Rating _____ Why this rating? _____

Strengths of this person: Rating _____ Why this rating? _____

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Would I trust this person with full access to my finances? Why or why not? _____

What are the main reasons I should choose this person? _____

What reasons are there not to choose this person? _____

What tasks do I need now or later, and who should perform them?

| Task | Now | Later | Who? |
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1st Possible Backup Agent: _____

2nd Possible Backup Agent: _____