

Durable Financial Power of Attorney Questionnaire

Your information:

Client Name: _____

Address: _____

City: _____

(*spouse's entries follow on page 3)

1. Appointment of Attorney-in-Fact

Name: _____

Address: _____

City: _____

Relationship: _____

2. Effective Date of Powers:

Immediately (and continues after incapacitated)

Only once incapacitated (2 doctors needed)

3. Original and Copies:

Where will you keep the original once signed: _____

4. Powers:

Banking (receive / deposit, pay bills, etc.)

Safe Deposit Box (access to – add, removed)

Lending/Borrowing

Gov't Benefits (apply for / receive)

Retirement Plan (contribute to, selection options, roll over)

Taxes (complete sign, pay, receive refunds)

- Insurance (pay, purchase, claims, cannot cash in)
- Real estate (acquire, lease, sell, convey)
- Personal property (acquire, sell, lease, exchange)
- Power to manage property (maintain, improve, repair)
- Gifts (make, transfer)
- Legal Advice / Proceedings (obtain, pay for, legal advice – defend, administer)
- Employ (agents, nurses, attorneys, accountants to preserve protect property and estate)
- Family care (expenditures for maintenance, education, benefit of spouse, children)

Other authority:

5. Notary:

Notary:

This document requires notary versus the option for two witnesses.

- Notary Option

Durable Financial Power of Attorney Questionnaire

Spouse information:

Client Name: _____

Address: _____

City: _____

1. Appointment of Attorney-in-Fact

Name: _____

Address: _____

City: _____

Relationship: _____

2. Effective Date of Powers:

Immediately (and continues after incapacitated)

Only once incapacitated (2 doctors needed)

3. Original and Copies:

Where will you keep the original once signed: _____

4. Powers:

Banking (receive / deposit, pay bills, etc.)

Safe Deposit Box (access to – add, removed)

Lending/Borrowing

Gov't Benefits (apply for / receive)

Retirement Plan (contribute to, selection options, roll over)

Taxes (complete sign, pay, receive refunds)

Insurance (pay, purchase, claims, cannot cash in)

- Real estate (acquire, lease, sell, convey)
- Personal property (acquire, sell, lease, exchange)
- Power to manage property (maintain, improve, repair)
- Gifts (make, transfer)
- Legal Advice / Proceedings (obtain, pay for, legal advice – defend, administer)
- Employ (agents, nurses, attorneys, accountants to preserve protect property and estate)
- Family care (expenditures for maintenance, education, benefit of spouse, children)

Other authority:

5. Notary:

Notary:

This document requires notary versus the option for two witnesses.

- Notary Option