



The Law Office of  
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## GENERAL POWER OF ATTORNEY QUESTIONNAIRE

### ATTORNEY WORK PRODUCT/ ATTORNEY-CLIENT PRIVILEGED INFORMATION

Full Legal Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Cell: \_\_\_\_\_ Other: \_\_\_\_\_ Fax: \_\_\_\_\_

E-Mail: \_\_\_\_\_ DOB: \_\_\_\_\_

*The General Power of Attorney lets you choose an agent and an alternate agent to make financial decisions for you. A General Regular Power of Attorney has a beginning and end date, but may still be revoked in writing at any time before the expiration date for no reason or for cause. A General Durable Power of Attorney has a beginning date and ends upon your death, but may still be revoked in writing at any time before your death for no reason or for cause. Your General Durable Power of Attorney will continue in the event of incapacity. It is a present power of attorney, which may be used even before incapacity, just for convenience. A power of attorney is invoked by the delivery of the written document itself. In other words, a person named under a power of attorney has no authority unless he or she possesses the paper upon which it is written. You may limit the authority you grant as much as you desire. e.g. You may have a General Regular Power of Attorney for one week that is limited to opening a savings account at a particular institution on your behalf. I am not recommending any particular choices in this questionnaire. Before answering these questions, you should think about your agent and alternate agent (if any) choices. You should likewise consider what financial decisions you want and/or do not want to authorize your agent to make on your behalf and if you want a time frame specified in the General Power of Attorney. Your agent is under a fiduciary duty to act in good faith on your behalf. If you have any questions regarding these questions, please talk to your financial planner about what the terms mean or leave the question blank and we will discuss the item further. Otherwise, please indicate your desires in this questionnaire and return it so that your General Power of Attorney can be drafted for your review.*

Type of General Power of Attorney that You Would Like (**Initial one**):

\_\_\_\_\_ General Regular Power of Attorney:

Effective Date: \_\_\_\_\_

Expiration Date: \_\_\_\_\_

\_\_\_\_\_ General Durable Power of Attorney:

Effective Date: \_\_\_\_\_

Selection of Your Representative (Agent):

I choose the following person to act as my representative to make financial decisions for me. ***(If married, usually spouse. If there is an actual disagreement between your agent and your alternate agent, this agent would be priority.)***

Full Legal Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Cell: \_\_\_\_\_ Work: \_\_\_\_\_ Home: \_\_\_\_\_

I choose the following person to act as my alternate representative to make financial decisions for me. ***(Optional. If there is an actual disagreement between your agents, this agent would be secondary.)***

Full Legal Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Cell: \_\_\_\_\_ Work: \_\_\_\_\_ Home: \_\_\_\_\_

Scope and Extent of Powers Granted by the General Power of Attorney ***(Initial any of the following)***:

\_\_\_\_\_ Personal Finances: This gives your Agent the ability to withdraw and deposit funds from bank accounts belonging to you, to enter and remove contents of all safe deposit boxes rented by you, receive money owed or belonging to you, loan money on your behalf, etc.

\_\_\_\_\_ Real Property: This gives your Agent the ability to purchase real property on your behalf or sell, lease, subdivide, convey, mortgage, litigate, insure, transfer, encumber, etc. any interest you have in real property.

\_\_\_\_\_ Personal Property: This gives your Agent the ability to buy personal property on your behalf or sell, exchange, transfer, litigate, insure, encumber, etc. your personal property.

\_\_\_\_\_ Business Transactions: This gives your Agent the ability to sign and execute any vote, approval, opposition, termination, investment, disposition, lease, indemnity, agreement, bill of sale, bond, check, release, etc. on your behalf for any of your business interest/decisions you may have.

\_\_\_\_\_ To Do and Perform Every and All Acts Required: This is the catch all for your Agent to cover all necessary or appropriate actions which you would do if personally present, and not otherwise specifically outlined in your General Power of Attorney.

\_\_\_\_\_ Other ***(Please explain in detail)***: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Specific Exclusions You Would Like Contained in the General Power of Attorney ***(Explain or write "not applicable")***:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

After your General Power of Attorney is prepared, please review it prior to signing to ensure it is consistent with your wishes. If it is not, contact me and we can correct any inaccuracies. Do not sign your General Power of Attorney until your witness and a Notary Public is present to watch you sign it. The witness must be at least 18 years of age, cannot be family (related by blood, adoption, or marriage), cannot be in your will to receive part of your estate, cannot be appointed as your representative, and cannot be a health care giver. A witness can be a neighbor, friend, or an acquaintance who is an adult, is not in your will, and is not caring for you or representing you. Then, it is critical that you talk about the documents and your wishes with your agent. An agent needs to know what your feelings are in order to act on your behalf. Except with respect to your spouse, you will need to decide in each case when to deliver the written document to the attorney-in-fact. You have three choices: (1) give the power of attorney to the attorney-in-fact to hold among his or her own papers, with instructions to use it when needed; (2) keep the power of attorney with your own papers with instructions to the alternate attorney-in-fact about where to locate the document in the event it is needed; or (3) leave the power of attorney in your attorney's office with instructions to deliver the power of attorney to the alternate attorney-in-fact upon the occurrence of certain events (your incapacity, instructions from you, etc.). You should keep the original notarized General Power of Attorney for your records. Some people and organizations may request to see the original General Power of Attorney for certain transactions. If you ever revoke your General Power of Attorney you should give a copy of it to your agent and inform any appropriate people so that they are advised your General Power of Attorney is no longer valid.

Additional specific requests or instructions for me: \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

\*\*\*Please indicate if you are interested in obtaining more information on any of the following additional forms:

\_\_\_\_\_ Living Will  
 \_\_\_\_\_ Durable Health Care Power of Attorney  
 \_\_\_\_\_ Durable Mental Health Care Power of Attorney  
 \_\_\_\_\_ Other Legal Information/Representation: \_\_\_\_\_