



Enduring Power of Attorney

Things to Consider - Checklist

1. Revocation

- If there are previous ones that are being revoked: locate, get back, and destroy

2. Your needs

- Immediate only
- Immediate and enduring
- Springing

3. Attorney(s)

- Who to name
- One or more
- Consider one or more alternates
- What skills, attributes, resources, experience do they have that make them appropriate
- Do they understand what it involves
- Have they agreed
- Gather all the information these people need
e.g.: location of your EPA / where to find all of your financial information
- Remember family dynamics!

4. Powers

- Consider what powers to give them (a little or a lot)
- Be clear!

5. Other Content Considerations

- Who makes decision (and how) that EPA will come into effect (if applicable)
- Who is to be notified that EPA has come into effect (and who do you not want notified)
- How / when decisions of Attorney to be reviewed
- Payment for the Attorney

6. Completion of Document

- Will you use a lawyer or not
e.g.: is your financial situation complicated, will anyone challenge your capacity, are there many familial difficulties
- Make sure all legal requirements are met
e.g.: witnesses

7. What to do with it

- Ensure you have certified or notarized copies
- Give a copy to individuals you want to have it
e.g.: Attorney, lawyer
- Keep a list of who has a copy (in case you need to get them back later)
- Keep the original in a safe place

8. Review regularly