



Barristers & Solicitors

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ENDURING POWER OF ATTORNEY WORKSHEET

DONOR – Person who is subject matter of document

Full Legal Name		Other Names Known By		
Home Address		City/Town	Province	Postal Code
Home Phone Number	Cell Phone Number	E-mail		

ATTORNEY SELECTION – Person who will make financial decisions for Donor

ATTORNEY #1 (FULL NAME and MUNICIPALITY, PROVINCE where resides)

ATTORNEY #2 (OPTIONAL - FULL NAME and MUNICIPALITY, PROVINCE where resides)

If more than one Attorney is being appointed, select from the following:

- Attorneys can act jointly and separately, meaning independently of each other at times (but must always confer on decisions)
- Attorneys must act jointly, meaning they must work together and agree on all decisions, as well as communicate those decisions collectively
- Each Attorney has separate powers to act solely in financial decisions (if selected, specify which Attorney and the powers they are solely responsible for):

Select one (optional):

- Majority Rules Final say (identify which one): _____

ALTERNATE ATTORNEY #1 (FULL NAME and MUNICIPALITY, PROVINCE where resides)

ALTERNATE ATTORNEY #2 (OPTIONAL - FULL NAME and MUNICIPALITY, PROVINCE where resides)

If more than one Alternate Attorney is being appointed, select from the following:

- Attorneys can act jointly and separately, meaning independently of each other at times (but must always confer on decisions)
- Attorneys must act jointly, meaning they must work together and agree on all decisions, as well as communicate those decisions collectively
- Each Attorney has separate powers to act solely in financial decisions (if selected, specify which Attorney and the powers they are solely responsible for):

Select one (optional):

- Majority Rules Final say (identify which one): _____

POWERS GRANTED TO ATTORNEY

Is the Power of Attorney to come into effect:

- IMMEDIATE: Immediately upon signing the document

OR

- SPRINGING: At a future time, either of the Donor's choosing, or upon the Donor suffering a mental or physical infirmity that prevents them from making reasonable judgments about some or all of their assets

Any restrictions on areas of authority granted to Attorney(s) / Alternate Attorney(s)?

Yes No

If yes, what are they?

Should any of the following powers be granted to your Attorney for the use of your resources after the Power of Attorney comes into effect?

- Transfer your property (including jointly owned property) to themselves during your lifetime? Yes No

If yes: All persons appointed Only certain Attorney(s) – specify below:

- Gifts to family members (i.e. Christmas, birthdays, baby gifts, wedding gifts, etc.) / charitable donations? Yes No
- Payments to support spouse / dependent children? Yes No
- Continue to manage any business interests (sole proprietorship, partner in partnership, or Shareholder/Director in private corporation)? Yes No
- Live independently in home as long as possible? Yes No
- Will your Attorney(s) receive compensation for handling your financial decisions on your behalf? Yes No

If yes (select one): Fair and reasonable (open ended)
 Hourly (based on fair market value wages for services)
 2.5% of funds received and disbursed annually