

lasting powers of attorney

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You should consider making a lasting power of attorney as there are times in every person's life, when they may need someone else to act on their behalf. It is not just something to consider in your later years but there are situations throughout your life when it could be useful.



Something to think about



The law has changed in relation to how you appoint people to manage your affairs in the event you are unable to do so yourself. The people you appoint are still called attorneys but now the form you use to appoint them enables you to specify, in some detail, what powers attorneys should have. As a consequence, the Lasting Powers of Attorney Form ("LPA") is 24 pages long and this questionnaire is designed to guide you and to give you some information about the contents of the form before you discuss it with us. You can create a further LPA to deal with Health and Welfare issues so please ask us for details if you are interested in this.

In addition to a witness to your signature, you will need someone to sign a certificate on the LPA to say that they have discussed the form with you, they are satisfied that you understand what you are signing and that you had mental capacity when you signed it. The certificate provider must have known you for two years or be qualified to assess this. We can provide this certificate for you unless you are appointing us as your attorneys. In this case we can make arrangements for an independent

solicitor to give such certificate. Your certificate provider may be asked to give evidence in court should there be a future dispute.

For the LPA to be used by your attorneys, it will need to be registered with the Office of the Public Guardian ("OPG"). If it is registered with the OPG, this doesn't mean you are necessarily incapable of handling your affairs, you may still wish to do some things but direct your attorney to take over other aspects. You can put guidance in the LPA.

You may decide the LPA does not need to be registered straight away. In this case, we can store it for you free of charge until we are notified by you, your attorney or your doctor that it is needed.

Please note that you can put telephone numbers, mobile numbers and email addresses in the LPA. Such details may therefore be seen by organisations such as banks or service providers who may use such details. If you do not want them to go into your LPA please tick this box

Your Details

Surname: _____ Forename: _____
Address: _____
Postcode: _____
Telephone: Home: _____ Work: _____ Email: _____
Occupation: _____ Date of Birth: | | Former Name: (if any) _____
Marital Status: Single Married Separated Divorced Civil Partnership Widowed Cohabiting

Your Assets

It would also be useful to have details of your financial assets and an estimate of their value, not just in the event of a dispute but so there is a record for future reference.

Your Home (Tick appropriate box)

(a) Do you: Own your own home Rent your home Other

(b) If the latter, give details: _____

(c) If you own your own home, is it:

in your name alone in joint names with spouse/partner in sole name of spouse/partner

	Yes	No		Yes	No
Stocks/Shares	<input type="checkbox"/>	<input type="checkbox"/>	Business Property	<input type="checkbox"/>	<input type="checkbox"/>
Unit Trusts	<input type="checkbox"/>	<input type="checkbox"/>	Agricultural Property	<input type="checkbox"/>	<input type="checkbox"/>
Bank Accounts	<input type="checkbox"/>	<input type="checkbox"/>	Foreign Property	<input type="checkbox"/>	<input type="checkbox"/>
Building Society Accounts	<input type="checkbox"/>	<input type="checkbox"/>	Other		
National Savings Accounts	<input type="checkbox"/>	<input type="checkbox"/>			
Life Policies	<input type="checkbox"/>	<input type="checkbox"/>			

Your attorneys and family



The decision about who to appoint is an important one. You can appoint any number of attorneys and substitute attorneys in the event the attorneys you have chosen cannot act for any reason. You should trust the people you appoint and be sure they will act in your best interest. You can appoint family, friends or a professional person to act on your behalf.

As well as details of your attorneys, it is also helpful for us to have them for your family or close friends. We will discuss your reasons for appointing your chosen attorneys and also the reasons for not appointing, for example, close family. Such details would be useful, for example, in the unlikely event of a dispute. You can also specify who you would like to be notified if the LPA is registered with the OPG. Please use the section below to give us this information.

Attorney/Family/Close friends

Please tick the box to indicate whether the person named is to be your attorney or whether they should be notified when your LPA is registered.

Please use an additional sheet if necessary.

Full name: _____
Address: _____

Postcode: _____
Tel/Mobile No: _____
Email Address: _____
Attorney
Notified
Replacement Attorney
Relationship to you: _____

Full name: _____
Address: _____

Postcode: _____
Tel/Mobile No: _____
Email Address: _____
Attorney
Notified
Replacement Attorney
Relationship to you: _____

