

Financial Power of Attorney

How To Checklist

With a Power of Attorney, you can appoint someone to make your financial decisions on your behalf when you can't do so yourself. Gentreo makes it easy to appoint a Power of Attorney to uphold your wishes and pay your bills if you become incapacitated and can no longer manage your own finances. We understand that planning your estate and creating your Power of Attorney can seem like a difficult process, but with Gentreo it is easy and affordable.

To help guide you through the process even further, we have provided you with a step-by-step guide to help assist you through everything.

Before You Start:

1. Gather contact information for up to three choices for your Power of Attorney agent
2. Decide whether you need a Limited or Durable Power of Attorney and the type of authority



Add Your Personal Information

It is important that all of this information is current and accurate to ensure that your Power of Attorney is valid.



Choose Which Type of Power of Attorney You Would Like to Create

You have two options for your Power of Attorney: Limited or Durable. A limited Power of Attorney only has authority during the allotted time period, expiring when you choose. A durable Power of Attorney has no expiration date, and holds authority until you revoke it. If you choose a Limited Power of Attorney, you must make sure that you choose the start and ending date. Typically it is best that the starting date is the current date.



Revoke a Prior Power of Attorney (if you have one)

If you currently have a Power of Attorney, you must revoke their current position in order to choose and create a new Power of Attorney. Revoking any current authority prevents legal issues and conflicts of authority over your finances.



Choose Your First Choice for Your Power of Attorney

This is one of the most important steps in the process. Your first choice for Power of Attorney should be someone close to you that you trust to handle your finances. To complete this section, you must include all their contact information. It is very important that this information is up to date and accurate to prevent any disruptions in the future.



Add a Second and Third Choice for Power of Attorney (optional, but recommended)

In the event that your first choice Power of Attorney passes away or is unable to uphold their responsibility as Power of Attorney, you can select second and third options as backup. This ensures that you are never left without a Power of Attorney. If you would like to add these second and third options, you can fill out their information exactly how you did for your first choice.

Grant General or Limited Authority

Giving your Power of Attorney general authority means they have total access over your financial matters. This means that there are no limits to what finances they can access and make decisions about. If you choose limited authority, you get to choose what they can and cannot control. If you choose the Limited option, continue through the two page checklist, choosing include for all of the financial matters you would like them to have access to, and exclude for those you would not. At the end, you will even have the option to manually write in any instructions which were not listed in the checklist.

Nominate a Conservator (optional)

A Conservator is someone that the court appoints to manage your estate. If you would like to name someone as your conservator, just input their contact information.

Nominate a Guardian (optional)

A Guardian is someone that the court appoints to manage your personal and health care decisions. If you would like to name someone as your Guardian, just input their contact information.

Make Your Power of Attorney Official

1. Print your documents. Upon completion of filling out your information for your Power of Attorney, your documents need to be printed out and, if required in your state, taken to a notary.

2. Get your Power of Attorney Notarized. In some states, your Power of Attorney needs to be signed in front of a witness and/or notary in order for it to be accepted by all financial institutions and be legally binding. This can be done in a variety of ways, though it is important to check which criteria are required by your state. For example, some states allow remote online notarization, however the majority of states do not.

[Click Here](#) to learn about remote online notarization laws in each state.

3. Upload the completed documents to your Gentreo Digital Family Vault. Uploading your signed Power of Attorney to the Gentreo Digital Family Vault allows you to access, edit, and share your document any time, and ensures that it is ready when you need it most. With the Gentreo Digital Family Vault, everyone knows where to turn in the event of an emergency and instant access is always just a few clicks away.

4. Share documents with your loved ones. By providing your loved ones with access to your Power of Attorney through your Gentreo Digital Family Vault, you ensure that they have instant access in the event of an emergency. You wouldn't want to put yourself or your finances at risk because your family cannot access the necessary documentation.

5. Update your documents as needed, when life circumstances change, live events happen, or laws in your state change. Gentreo is with you every step of the way.

Congratulations, you have completed your financial Power of Attorney!