

DATE
------

**Information for Attorney when managing business on behalf of the Donor**

Donor First Name:

Donor Last Name:

The following is intended for the Attorney who will oversee transactions on behalf of the Donor, and additional items the Attorney can use to keep track all in one document.

**POWER OF ATTORNEY – PRELIMINARY STEPS**

Do you have any undischarged bankruptcies? <i>If yes, attorneys cannot be in bankruptcy state to do business on behalf of the donor.</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No
As Power of Attorney when you electronically sign the MAXA Financial application, you acknowledge your actions must be exclusively for the donor’s benefit; the attorney(s) may not deal with the donor’s property for their personal purposes. Each attorney is aware of this limitation. <b>MAXA Financial has no responsibility to monitor or supervise attorneys’ conduct.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
Obtain a copy of the POA document(s).	<input type="checkbox"/>
Verify that the POA document(s) is the most recent one signed by the donor.	<input type="checkbox"/>
Ensure that all preconditions for acting as the attorney have been met.	<input type="checkbox"/>
Confirm whether you are the only named attorney, or if others have been named to act as well and in what capacity.	<input type="checkbox"/>
Obtain copies of any management plans or court orders related to the power of attorney.	<input type="checkbox"/>
Discuss the agreement, and your duties and authority as attorney, with the donor (if possible).	<input type="checkbox"/>
Establish relationships with close family, friends, and other key caregivers of the donor.	<input type="checkbox"/>
Review the donor’s personal records and contacts and establish a system for ensuring organization and protection of this information and your actions.	<input type="checkbox"/>

List of attorneys who can manage business on behalf of the donor.

Name

Donor Birth Certificate  Donor Marriage Certificate  Other

Birth/Marriage/Other	Location

Name and contact information of all Financial Institutions, including banks, credit unions, brokerage firms, wealth management, and insurance companies.

Name	Contact Information

Information about pension(s), life insurance and annuities.

Name	Contact Information

Names and contact information of financial advisor and tax preparer.

Name	Contact Information

Deeds to property and cemetery plots.

Name	Contact Information

Vehicle titles and registration.

Name	Registration number

<b>POWER OF ATTORNEY FOR PROPERTY</b>	
Create a complete list of the donor's assets and liabilities as of the date of your first action.	<input type="checkbox"/>
Establish an ongoing list of acquisitions and dispositions made on the donor's behalf (e.g., money received, investments made, liabilities incurred or discharged), obtaining receipts for all transactions.	<input type="checkbox"/>
Locate and review the donor's will and document any specific instructions concerning property and bequests.	<input type="checkbox"/>
Notify all banks, brokers, and financial institutions the donor has business with that you are acting as the donor's attorney: confirm whether the donor created any other POA documents with them and redirect statements if necessary.	<input type="checkbox"/>
Cancel MemberCard(s).	<input type="checkbox"/>
Check Bank of Canada website for unclaimed balances in donor's name.	<input type="checkbox"/>
Locate all original investment certificates, stocks, bonds, property deeds, etc. and document them.	<input type="checkbox"/>
Notify appropriate institutions and redirect annuities, pensions, and registered funds.	<input type="checkbox"/>
Review the suitability of the investment portfolio and any surplus cash, making any necessary and allowable adjustments to meet cash requirement.	<input type="checkbox"/>
Identify and document all other personal assets.	<input type="checkbox"/>
Notify Canada Revenue Agency, provide them with a copy of the POA document and request a statement of account showing all outstanding taxes, refunds and instalments paid to the current date.	<input type="checkbox"/>
File any outstanding and ongoing tax returns and pay all income taxes owing.	<input type="checkbox"/>
Notify the appropriate authorities and redirect CPP/QPP, OAS, Veteran's Pension Payments and GST/HST credits.	<input type="checkbox"/>
Notify insurance companies or other institutions regarding auto, home, disability, or life insurance that you are acting as the donor's attorney and redirect statements if necessary.	<input type="checkbox"/>
Ensure adequate insurance for assets, and upkeep of property.	<input type="checkbox"/>
Set up disability insurance payments if required.	<input type="checkbox"/>
Apply for any pensions or other payments to which the donor may be entitled.	<input type="checkbox"/>
Consider any potential litigation to be instituted or defended	<input type="checkbox"/>
Cancel auto registration and insurance, if applicable, and collect any refunds	<input type="checkbox"/>
Investigate and record all debts owed by the donor.	<input type="checkbox"/>
Arrange for the payment of debts with any surplus cash (pay by cheque and have cheques returned).	<input type="checkbox"/>
Cancel the donor's credit card(s) and return the card(s) to the issuers.	<input type="checkbox"/>
Document (including assets used in calculation) any compensation taken for your attorney duties.	<input type="checkbox"/>
Consult with the person acting as attorney for health care regarding health care, safety, and shelter for the donor. Obtain a written description of decisions made and make all necessary financial arrangements.	<input type="checkbox"/>
If there is no named attorney for health care, obtain legal advice regarding the donor's current circumstances.	<input type="checkbox"/>
Notify personal attendants, housekeepers, gardeners, and other staff of your role as attorney and advise as required.	<input type="checkbox"/>
Create a monthly budget consisting of all income expected and payments required to ensure the donor's immediate and ongoing financial needs can be met.	<input type="checkbox"/>

Initiate the sale of assets if required (subject to the will).	<input type="checkbox"/>
Cancel memberships and other subscriptions if required.	<input type="checkbox"/>
<b>POWER OF ATTORNEY FOR HEALTH CARE</b>	
Record all decisions regarding health care, safety and shelter made on behalf of the donor.	<input type="checkbox"/>
Retain copies of medical reports or other documents related to each decision.	<input type="checkbox"/>
Record the names of persons consulted on each decision.	<input type="checkbox"/>
Document the donor's wishes (if expressed) related to each decision.	<input type="checkbox"/>
Describe the donor's current wishes (if known).	<input type="checkbox"/>
Make note of your own opinion for each decision made.	<input type="checkbox"/>

***This checklist is intended for the purposes of providing information and guidance only. This checklist is not intended to be relied upon as the giving of legal advice and does not contend to be exhaustive.***