

Let us confirm your personal information is up to date:

Donor First Name:

Donor Last Name:

The following is intended for the Member (Donor) who is initiating the Power of Attorney.

If you can answer YES to all the following you are ready to proceed.

**DONOR – PRELIMINARY STEPS (Primary members section)**

I have sought legal advice to ensure that a power of attorney is the most suitable option for my personal circumstances.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand what it means to give someone power of attorney and the implications associated with it.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand the difference between a power of attorney and joint accounts.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have a power of attorney document that meets all the legal requirements for the province or territory in which I live.	<input type="checkbox"/> Yes <input type="checkbox"/> No
My attorney(s) know to set up the power of attorney, an electronic or scanned signed copy of the power of attorney (POA) document must be uploaded to MAXA Financial website using the Power of Attorney Contact Us form.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have informed my attorney(s) to set up the power of attorney, they will need to electronically sign through the Application to allow MAXA Financial to verify their identity.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand if I appoint more than one attorney, where they must sign dually, they cannot have online banking access, however, can have MemberCard to view balances, deposit cheques, or cash. No withdrawals.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I understand MAXA Financial only accepts English versions of Power of Attorney documents.	<input type="checkbox"/> Yes <input type="checkbox"/> No
I have informed my attorney(s) that electronically signing through the Application process, they acknowledge their actions must be exclusively for my benefit; the attorney(s) may not deal with my property for their personal purposes. Each attorney is aware of this limitation. <b>MAXA Financial has no responsibility to monitor or supervise your attorney's conduct.</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No

*This checklist is intended for 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.*