

Power of attorney questions



Family conversation | page 1 of 2

Ask the parent what help they want. This worksheet is not a legal form and grants no authority.

Help wanted with money or paperwork

Help wanted with health decisions

Preferred agent and backup to discuss

Tasks or powers the parent wants to limit

Existing documents: where kept, not account numbers

Questions and concerns the parent wants answered

Keep notes private. Use a qualified local attorney for legal decisions.

Legal appointment notes



Questions for a qualified local attorney | page 2 of 2

Ask about state rules, signing, authority, safeguards and when documents end.
Record professional answers.

Which financial and health documents fit our needs?

When does authority start? What does durable mean here?

What decisions remain with the parent? How to revoke?

Agent records, reporting and limits

If the agent cannot serve; authority after death

Next action, person responsible and review date

Do not write account numbers, passwords or Social Security numbers here.