



YOUR NEXT STEP

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POWER OF ATTORNEY CHECKLIST

Simple Legal Planning

Planning ahead helps ensure your wishes are respected and gives peace of mind to you and your loved ones.



1. CHOOSING A PERSON

- Select someone you trust
- Make sure they agree to take the role



Choose someone who understands your values and will act in your best interests.



2. SETTING IT UP

- Speak with a lawyer or notary
- Complete legal documents
- Understand what powers are given



Professional guidance ensures your documents are valid and clear.



3. INFORMING OTHERS

- Tell family members
- Provide copies to relevant people



Open communication helps everyone understand your plans.



4. SAFE STORAGE

- Store documents in a safe place
- Keep copies accessible if needed



Safe storage ensures your documents are available when they're needed.



Remember: A little planning today can make a big difference tomorrow.
Your peace of mind is priceless.



YOUR NEXT STEP
Resources for Life's Transitions



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Helping Seniors and Families Make Confident Decisions for a Better Tomorrow.