



826 BrooksideAve., Suite C • Redlands • California • 92373 • (909) 335-0155

## Power Of Attorney Worksheet

Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone # \_\_\_\_\_  
SS# \_\_\_\_\_

Who would you like to be your power of attorney?

Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone # \_\_\_\_\_

Would you like an alternate?            **YES**            **NO**

Name: \_\_\_\_\_  
Address: \_\_\_\_\_ Phone # \_\_\_\_\_

Listed below are duties for your power of attorney. Check all the boxes that you would like your power of attorney to fulfill or check box P for all of the duties listed or Q for only specific powers which you would list on a separate sheet of paper.

- \_\_\_\_\_ (A) Real Property Transactions.
- \_\_\_\_\_ (B) Tangible Personal Property Transactions
- \_\_\_\_\_ (C) Stock and Bond Transactions.
- \_\_\_\_\_ (D) Commodity and Option Transactions
- \_\_\_\_\_ (E) Banking and Other Financial Transactions.
- \_\_\_\_\_ (F) Business Operating Transactions.
- \_\_\_\_\_ (G) Insurance and Annuity Transactions.
- \_\_\_\_\_ (H) Estate, Trust, and Other Beneficiary Transactions.
- \_\_\_\_\_ (I) Claims and Litigation
- \_\_\_\_\_ (J) Personal and Family Maintenance.
- \_\_\_\_\_ (K) Benefits From Social Security, Medicare, Medical, or Other Governmental Programs or Civil or Military Service.
- \_\_\_\_\_ (L) Retirement Plan Transactions.
- \_\_\_\_\_ (M) Tax Matters.
- \_\_\_\_\_ (N) Making Gifts to My Spouse, Children, and More Remote Descendants, and Parents, Not to Exceed in the Aggregate \$10,000 to Each of Such Persons in Any Year.
- \_\_\_\_\_ (O) Full and Unqualified Authority to My Attorney(s)-In-Fact to Delegate Any or All of the Foregoing Powers to Any Person or Persons Whom My Attorney(s)-In-Fact Shall Select.
- \_\_\_\_\_ (P) **ALL THE POWERS LISTED ABOVE.**
- \_\_\_\_\_ (Q) **ONLY THE POWERS SPECIFIED IN SPECIAL INSTRUCTIONS ON A SEPARATE PAGE.**

Would you like this document to take effect the day that you sign it or immediately?

**WHEN I SIGN**

**IMMEDIATELY**

If you would like the document to take effect at a later date, then when would you like the document to take effect? \_\_\_\_\_

Date

