

Power of Attorney Worksheet

Handout available for download on the [YRRP website](http://www.yellowribbon.mil/cms/event-handout) at:
www.yellowribbon.mil/cms/event-handout

This worksheet will help prepare you to discuss your needs and desires with an attorney and provide a convenient form on which to record important information. This worksheet starts the power of attorney (POA) preparation process. After you complete it, you will discuss your need for a POA with an attorney. If you have any questions, which are not answered by this worksheet, please discuss them with an attorney.

A POA gives full legal power to the person named in the document to make decisions on your behalf. That means he or she can manage and conduct affairs and act in matters in your name and on your behalf. You will be held legally responsible for those things that you have authorized your agent to do for you. We strongly recommend that you only give such a document to someone you trust completely with no reservations. There are two basic types of POAs: 1) general, which authorizes your agent to do all things in your name and behalf and 2) special/limited, which authorizes your agent to do only those things that you specify.

Please print legibly

Today's date: _____

Grantor full name (first, middle, last) including any suffixes (e.g., Jr., Sr., III):

Unit: _____ Pay grade: _____ Retired? _____

Cell #: _____ Home #: _____ Work #: _____

Social Security Number: _____

Legal residence address (street, city, state, zip code)

Present physical address (street, city, state, zip code)

State of listed residence (your home for tax purposes) _____

Agent full name: _____

Agent address (street, city, state, zip code) _____

1. Are you placing a vehicle in the control of someone whose name is not on the title? If so, please list vehicle year, make, model, VIN #, and indicate what you want him or her to be able to do with the vehicle (e.g., drive, repair, register, sell).
2. Does this person need access to your checking and savings accounts but is not listed on the account with you? If yes, please name the bank, location of the bank, and account number.
3. Will this person be taking care of a home that you own while you are gone? If so, please give the address of the home and indicate whether you would like him or her to be able to transfer, initiate, or terminate utilities in your name.
4. Are you selling or buying a house? (List the legal description of the house/property.)
5. Do you want this person to be able to inquire into your finances or pay records?
6. Will this person take care of custodial issues (e.g., medical or dental care, school issues for dependent children)?
7. List the other things that you want your agent to do here:

If you desire a POA, please indicate what type and complete A and B (if applicable).

General POA _____

Special POA _____

- A. Whom do you wish to name as the agent for the POA? (Please provide full name, residing address, and phone numbers):
- B. (Complete only if you desire to name an alternate agent) What is the full name, residing address, and phone numbers of your alternate agent for the POA?

A medical POA gives full legal power to the person named in the document to make healthcare decisions for you if you become incapacitated.

If you desire a medical POA, please complete A and (if applicable) B below.

- A. Whom do you wish to name as the agent for the medical POA? (Please provide full name, residing address, and phone numbers):

- B. (Complete only if you desire to name an alternate agent) What is the full name, residing address, and phone numbers of your alternate agent for the medical POA?

Please list below any additional information or desires as to your will and/or POAs that was not previously covered.

Will Worksheet

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This worksheet will help prepare you to discuss your needs and desires with an attorney and provide a convenient form on which to record important information. This worksheet starts the will preparation process. After you complete it, discuss your will with an attorney. If you have any questions, which are not answered by this worksheet, please discuss them with an attorney.

What is a will? A will can be generally defined as “a legal declaration of a person’s wishes regarding the disposal of his or her property or estate after death” (Merriam-Webster, n.d.). A will also contains specific directions from you concerning who is to implement your instructions and perhaps who will care for any minor children you may leave behind.

Why should I have a will? Having a will will ensure that your property is distributed in accordance with your wishes and that your minor children are raised by a designated guardian should something unfortunate happen to you resulting in loss of life.

Does my will control all of my property when I die? No. For example, proceeds of insurance policies are distributed as you have designated in the insurance policy, and property you own jointly with another person will normally go to the other joint owner.

Part A: Personal Data

Full name (first, middle, last) including any suffixes (e.g., Jr., Sr., III):

Present physical address (no P.O. Box):

Social Security Number: _____

Do you currently have a will? ☐ No ☐ Yes – Bring it with you

Cell #: _____ Home #: _____

Work #: _____

State of legal residence (your home for tax purposes): _____

In what state are you now living? _____

Marital status: ☐ Never Married ☐ Previously Married ☐ Married

Spouse’s full name: _____

List the names, ages, and sexes of all your biological, adopted, and step children; notate whether each child listed is a biological, adopted, or step child.

Military status: ☐ Active Duty ☐ Retired ☐ Prior Military Service
☐ Family Member of Active Duty ☐ Family Member of Retiree

Pay grade (if applicable): _____

Unit and Unit mailing address:

Part B: Distributing your Belongings

How do I give my belongings away? Generally speaking, you may state in your will that you are leaving your property to anyone you wish; although, some states have laws that may give your spouse and/or your children a right to a portion of your property despite what you write in your will. Most married couples leave all the property to the spouse, and, if the spouse does not outlive him or her, then they leave it to the children.

Can I give specific gifts to people? Yes, these are called specific bequests, and you may make them by fully describing what you want to give and the person to whom you are giving the gift. You should be careful about specific bequests. If you dispose of property that you describe prior to your death, or, if there is any doubt about the exact property that you described in your will, you may be creating difficulties for your personal representative/executor.

1. How do you want to leave your property when you die?

- ☐ All to spouse
☐ Other (print full name(s) and relationship to you)

2. If the person(s) named in #1 does not outlive you, then whom do you want to have your property?

- ☐ Your children
☐ Other (print full name(s) and relationship to you)

3. If the person(s) named in #2 does not outlive you, then whom do you want to have your property?
[] Your grandchildren
[] Other (print full name(s) and relationship to you)
-

4. Do you want to place specific bequests in your will?
-

5. Do you wish to disinherit anyone? (print full name(s) and relationship to you)
-

Part C: Personal Representative

What is a personal representative/executor? A personal representative is a person whom you name in your will who will distribute your belongings in accordance with what you say in your will. His or her job is to settle your estate. This includes paying any taxes or debts, which you still owe upon your death.

Who should I pick as my personal representative? You should pick someone who has good business judgment and someone whom you trust to make good decisions about your estate and who will not be overwhelmed by the process. Some people name their spouse as personal representative. Others name relatives or close friends.

Who is the person you wish to make as personal representative of your will?

- [] Spouse
[] Other (print full name and relationship to you)
-

If you wish to name an alternate personal representative, print the full name and relationship to you.

Part D: Caring for your Children after you are Gone (if you have Minor Children, Complete Part D. If not, continue to Part E)

What is a guardian? A legal guardian is the person who will act as a parent for any of your children who are minors at the time of your death. Normally, if you are survived by your spouse, he or she becomes the children's guardian if he or she is the biological or adoptive parent of the children. However, it is recommended that you name a guardian and an alternate guardian in the event that both you and your spouse die. If you or your spouse have children not born of your current marriage, you should discuss the situation in detail with an attorney to determine the most appropriate way to provide for the children.

Print the full name and relationship to you of your first choice to be legal guardian.

If you wish to name an alternate guardian, print the full name and relationship to you.

What is a trustee? A trustee is the person who manages the property that you pass to your children upon your death. Often, the trustee and alternate trustee (if you wish to name an alternate) are the same individual(s) whom you appointed as the guardian and alternate guardian, but a trustee can be someone different if you choose.

Print the full name and relationship to you of your first choice to be trustee(s).

If you wish to name an alternate trustee, print the full name and relationship to you.

Choosing an age of final distribution: At a certain age, your child/beneficiary will be entitled to manage their inheritance on their own. You can determine at what age you consider the child/beneficiary to be ready for such a responsibility. Frequently chosen ages include Age 18, Age 21, and Age 22 (Note: Age 22 is computed based upon a rough determination of Age 18 plus four years of college).

What age of majority would you like to set for your child/beneficiary's trust to vest or end? _____

Part E: Another Document to Consider

Living will: A living will is a document, which expresses your desire that extraordinary measures not be taken to save your life. It is a document used only when a person is

determined to be in a state from which he or she is unlikely to recover, such as a vegetative state.

If you desire a living will, please complete A thru D.

A. In which state would you like your living will to take effect?

State of legal residence _____ Current duty station _____

Other _____

B. Do you wish to authorize the donation of organs and tissues for transplant?

☐ Yes ☐ No

C. Do you also wish to authorize the donation of organs and tissues for medical, scientific, and other similar purposes?

☐ Yes ☐ No

D. Do you wish to express a desire to die in your home instead of a hospital?

☐ Yes ☐ No

Important Legal Documents

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It is important to have access to certain legal documents and family records. Use this handout to help identify your important papers by putting a mark next to the ones that apply to you. When you get home, make sure these documents are stored in a place where they cannot be lost or destroyed, such as a fire-proof safe or safety deposit box. Ensure you and the individual(s) handling your personal affairs know where to find them.

Documents

- ☐ Adoption papers
- ☐ Automobile
 - ☐ Registration
 - ☐ Title
- ☐ Bank accounts
 - ☐ Checking
 - ☐ Savings
- ☐ Birth certificates for all family members
- ☐ Citizenship papers
- ☐ Court orders (child custody/support)
- ☐ Credit card account numbers
- ☐ Death certificate
- ☐ Divorce decree
- ☐ Emergency contacts
- ☐ Employment records
- ☐ Family members address, email, and telephone number
- ☐ Financial statements
- ☐ Funeral/burial arrangements
- ☐ ID cards or signed DD Form 1172
- ☐ Immunization/shot records for all family members and pets
- ☐ Insurance policies (government and civilian)
- ☐ List companies, policy numbers, address, and telephone number of agents for:
 - ☐ Automobiles
 - ☐ Health
 - ☐ Home
 - ☐ Life
 - ☐ Long-term care
- ☐ Leave and Earnings Statement (LES) for past three months
- ☐ Loans
- ☐ Include all installment contracts (e.g., car, furnishings)
- ☐ Marriage certificate
- ☐ Medical and dental records
- ☐ Military service documents
- ☐ Orders to Active Duty, PCS, or TDY
- ☐ Organ donor instructions
- ☐ Passports with any required visas
- ☐ Personal property inventory
- ☐ Recent photographs for all family members
- ☐ Powers of Attorney (general or special [e.g., medical])
- ☐ Real estate documents (deeds, leases, rental agreements, and mortgages)
- ☐ Retirement plans
- ☐ School registrations
- ☐ Social Security numbers
- ☐ Tax records for past six years
 - ☐ Federal and state
- ☐ Wills
 - ☐ Advanced directive
 - ☐ Living will