POA CAREGIVER
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AGENT CONVERSATION GUIDE

# Before You Say Yes

*Questions to Talk Through Before Agreeing to Serve*

Being asked to serve as someone's financial Power of Attorney agent or Health Care Agent is a sign of trust. It is also a real commitment. Sit down together with this guide before you agree, and write down what you each say. It is fine to take time before answering, and it is fine to say no.


01 Understanding the Role

02 What the Role May Involve

03 Documents and People

04 Your Answer and Next Steps




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# 01 Understanding the Role

Financial agents and Health Care Agents are different roles, usually named in different documents. Be clear about which one you are being asked to take on.

**Which role are you being asked to accept?**

☐ Financial Power of Attorney agent ☐ Health Care Agent ☐ Both ☐ Not sure yet

**Why did they choose you?**

**Is anyone else named, such as a co-agent or successor?**

Name Role

Name Role

**What are you hoping I'll help with, and what would you rather keep handling yourself?**

> Being named in a document does not by itself give you authority to act. The document and your state's law say when, and how, authority begins.



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# 02 What the Role May Involve

Talk honestly about time, distance and the kind of help that may be needed. There are no wrong answers here, only what is realistic.

**How close do we live to each other, and how might distance affect what I can do?**

**What kinds of help might be needed first?**

- ☐ Paying bills
- ☐ Banking
- ☐ Talking with doctors
- ☐ Insurance and benefits
- ☐ Home or property
- ☐ Not sure yet

**How much time do you expect this could take, now and later?**

**If you need health care decisions made, what matters most to you?**

**Are there family members who may disagree, and how should I handle that?**

> Your wishes should guide every decision while you can still make them yourself. An agent acts for you, not instead of you.



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# 03 Documents and People

Knowing what exists, and where it is, makes it far easier to help when the time comes.

**Which documents are signed, or still being prepared?**

- ☐ Financial Power of Attorney
- ☐ Health care directive
- ☐ Will
- ☐ Trust
- ☐ HIPAA authorization
- ☐ Not sure

**Where are the originals kept, and who has copies?**

Originals kept at

Copies held by

**Who are the professionals I may need to contact?**

Attorney

Financial or tax professional

Primary doctor

Other

**Is there anything you want me to know that is not written down?**

> Never write passwords, PINs or account security answers on this guide. Note only where that information is securely kept.



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# 04 Your Answer and Next Steps

Take the time you need. Agreeing, agreeing with conditions or declining are all reasonable answers.

**After talking this through, my answer is:**

☐ Yes, I agree to serve ☐ Yes, with these conditions ☐ I need more time ☐ No, I can't serve

**Conditions, concerns or questions I still have**

**Questions to bring to an attorney or other qualified professional**

**What we agreed to do next**

Next step | By when

Next step | By when

**Date of this conversation**

> This guide records a conversation. It does not create, change or accept any legal document or authority.



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