First Steps After Being Named an Agent

A Practical Starting Checklist

Being named as an agent and having authority to act are not the same. Your document and your state's law say when authority begins. Use this checklist to get ready. Not every item applies to every person.

> You do not need to access accounts, change financial arrangements or make medical decisions just because you were named. Act only once your authority has begun and the situation calls for it.

01 Understand Your Appointment

- [ ] Confirm which role you were named for: financial Power of Attorney agent, Health Care Agent, or both.
- [ ] Note whether you are the first agent, a co-agent or a successor agent.
- [ ] Find out whether the document says authority begins when signed or only after a stated event.
- [ ] Remember that being named is not the same as having authority to act.

02 Review Relevant Documents

- [ ] Read a complete copy of each document that names you.
- [ ] Note where the signed originals are kept, and who has copies.
- [ ] Write down anything you do not understand, to ask about later.
- [ ] Ask whether a HIPAA authorization or other release of information is in place.

03 Identify Important Contacts

- [ ] The attorney who prepared the documents, if there is one.
- [ ] Others named in the documents, such as co-agents or successors.
- [ ] Family members and anyone the person wants kept informed.
- [ ] Doctors, financial institutions or advisors you may need to contact later.

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04 Discuss Expectations

- [ ] Ask what the person wants help with, and what they will keep handling themselves.
- [ ] Talk about their wishes and values for financial and health care decisions.
- [ ] Agree on how, and how often, you will keep each other informed.
- [ ] Be honest about your time, distance and any concerns.

05 Organize Essential Information

- [ ] Start one folder, paper or digital, for documents and notes.
- [ ] Record where important documents and records are kept.
- [ ] Never write down passwords or PINs. Note only where they are securely kept.
- [ ] Keep a simple log of conversations and any actions taken.

06 Determine Your Next Steps

- [ ] List questions for an attorney or other qualified professional.
- [ ] Check your state's official resources for its requirements.
- [ ] Set a date to review this checklist together again.

My Next Three Priorities

1 _____

2 _____

3 _____

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