

# A CLIENT'S GUIDE TO CHOOSING A GENERAL POWER OF ATTORNEY



When you sign a general power of attorney, you authorize someone to manage financial matters as if they are you in the event that you are unable to do so. That's a lot of responsibility to sign over to someone. You need to pick someone who is trustworthy and who will act in your best interest. But you also want to choose someone who can handle the responsibility of managing the assets you have accumulated during your life. You wouldn't ask your 20 year-old child to run your crop-dusting business, would you?

## FACTORS TO CONSIDER

- ✓ Who do you trust with your finances?
- ✓ Who can handle the responsibility?
- ✓ Who is best suited to the required tasks?
- ✓ Who is most conveniently located?
- ✓ Who will be alive when they are needed?
- ✓ Who will be caring for you physically?
- ✓ Who could act as an alternate if needed?

## SOME FAMILY CONSIDERATIONS

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Obviously, you need to appoint someone you trust. Typically, the first person you turn to is your spouse. This is a great choice as primary power of attorney in most situations, but what if your spouse can't do it? Most often, people choose another family member, like a child or a sibling. But before you just assign the duties to your oldest child, consider whether that child has the knowledge and experience necessary to manage your affairs. Is a graphic designer the best choice to manage a farm operation? Would you trust your nest egg to a college senior? After all, you are trusting them with your checkbook.

## LET'S BE PRACTICAL

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In the grand scheme of things, convenience is going to play a major role in deciding who should act as your power of attorney. On one hand, it might make your five children feel good to all be appointed together as your agent. But is it wise to make the child who lives in the same town as you call her older sisters who live in Phoenix, Cleveland, and Beijing every time she needs to make a decision? Consider whether the better option is to appoint one child or sibling as primary agent and appoint the others as alternates.

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*This brochure is an educational device and should not be treated as legal advice. Always seek the advice of an attorney licensed in your state before making decisions about your estate plan.*



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