Power of Attorney

Date of Program: ____________________  Group Name: _________________________

Number of participants: __________________

“Attention” Getter
- A POA is a document in which one person gives another person the power to conduct certain actions on his or her behalf. Examples of situations in which a written POA could be useful include:
  - A single woman whose mother has Alzheimer’s disease realizes she would need someone to make financial decisions if she develops the same condition.
  - An adult with a cognitive or psychiatric disability who lives and works independently, but needs assistance with financial decisions.
  - An elderly grandmother with macular degeneration wants her daughter to identify bills received in the mail and write checks for them because she can no longer see.
  - A wife and husband who want to give each other authority to manage finances should either one should become incapacitated.

Talking Points
- The 2011 Montana Legislature adopted the Uniform Power of Attorney Act that sets out provisions for the creation and use of a POA and provides a statutory POA form.
- The person who gives the power (principal)
- The person who authorized to make decisions on behalf of principal (agent)
- The two forms (1) Montana Statutory Power of Attorney (2) Agent’s Certification as to the Validity of Power Attorney and Agent’s Authority can be downloaded at www.montana.edu/estateplanning, scroll down underneath Power of Attorney
- A POA is a valid if the document was signed by the principal or in the principal’s presence by another individual who is directed to sign the principal’s name.
- A POA is effective when it is signed unless the principal provides instructions otherwise.

Handouts for Participants

Evaluation Quickie
- How many of you plan to complete a Power of Attorney Form?
  - Number ____________________ Percent ____________________
- How many of you plan to share the Power of Attorney MontGuide with others?
  - Number ____________________ Percent ____________________