

**21. PERSONAL LPA – PROPERTY AND FINANCIAL AFFAIRS – Pg 28-31**

**Donor(s)/Person Making the LPA**

	Name
Donor 1 (D1)	
Donor 2 (D2)	

**Attorneys – same as Business PFA LPA?**

If different, please complete below

**Donor 1 (D1)**

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

**Donor 2 (D2) – same as D1?**

If different, please complete below

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

Trust Company to act?	D1		D2	
If so, what level?	D1		D2	
NOTES including Trust Company name and address				

<b>When can attorneys make decisions?</b>	<b>Either/Or</b>		<b>Either/Or</b>	
From registration of LPA?	D1		D2	
When donor loses capacity?	D1		D2	

<b>How are attorneys to act?</b>				
Original Attorneys	Solely	<input type="checkbox"/>	Jointly for some/ severally for others (details)	
	Jointly	<input type="checkbox"/>		
	Jointly and Severally	<input type="checkbox"/>		
Replacement Attorneys	Solely	<input type="checkbox"/>	Jointly for some/ severally for others (details)	
	Jointly	<input type="checkbox"/>		
	Jointly and Severally	<input type="checkbox"/>		

<b>When should replacement attorneys step in?</b>	<b>Either/Or</b>			<b>Either/Or</b>		
As soon as one main attorney is unable	D1	<input type="checkbox"/>	<input type="checkbox"/>	D2	<input type="checkbox"/>	<input type="checkbox"/>
Only when all main attorneys are unable	D1	<input type="checkbox"/>	<input type="checkbox"/>	D2	<input type="checkbox"/>	<input type="checkbox"/>
NOTES including details of certain order if required						

<b>People to Notify (anyone who may contest your setting up of an LPA e.g. if they are left out of your Will)</b>		
Name	Address	Donor

<b>Preferences – Donor 1</b>	
<b>Instructions are legally binding, preferences are guidance (e.g. include details of preferred estate planner, accountant, financial adviser etc)</b>	
Instructions (must happen - use words such as 'must' for clarity)	
Preferences (for guidance - what you would like to happen but the attorneys are not bound by it)	

<b>Preferences – Donor 2</b>	
<b>Instructions are legally binding, preferences are guidance (e.g. include details of preferred estate planner, accountant, financial adviser etc)</b>	
Instructions (must happen - use words such as 'must' for clarity)	
Preferences (for guidance - what you would like to happen but the attorneys are not bound by it)	

Allow attorneys access to digital assets?	D1		D2	
Allow attorneys access to bank accounts?	D1		D2	
Allow attorneys access to Will?	D1		D2	
Allow DIMs to continue or attorneys to transfer funds into one if they see fit?	D1		D2	
<p>Note: Discretionary Investment Management (DIM), also known as Discretionary Fund Management (DFM) is a form of investment management whereby someone else; usually a portfolio manager, IFA, stockbroker or bank, make the decisions to invest (buy/sell) on the client's behalf. The investment manager will make these decisions at their own discretion, without consulting the client, hence the name.</p> <p>If the client has any funds under discretionary management, or may have in the future, the authority for the manager lapses when an LPA comes into use as attorneys should make those sorts of financial decisions from that point on. The attorney(s) can only continue with the current arrangements, or use an investment manager in the future, if specific power is given to them.</p>				
Would you like the company to act as Certificate Provider?	D1		D2	

**NOTES**

**22. PERSONAL LPA – HEALTH AND WELFARE – Pg 32-35**

**Donor(s)/Person Making the LPA**

	Name
Donor 1 (D1)	
Donor 2 (D2)	

**Attorneys – same as Personal PFA LPA?**  
**Donor 1 (D1)**

If different, please complete below

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

**Donor 2 (D2) – same as D1?**

If different, please complete below

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

<b>Full Name incl. title</b>			
Home Address			
Date of Birth		Occupation/SE	
Contact Numbers		E-mail Address	
Relationship		Main/Replacement	

<b>When can attorneys make decisions?</b>		<b>Either/Or</b>		<b>Either/Or</b>	
From registration of LPA?	D1	<input type="checkbox"/>	<input type="checkbox"/>	D2	<input type="checkbox"/>
When donor loses capacity?	D1	<input type="checkbox"/>	<input type="checkbox"/>	D2	<input type="checkbox"/>

<b>How are attorneys to act?</b>					
Original Attorneys	Solely	<input type="checkbox"/>	Jointly for some/ severally for others (details)		
	Jointly	<input type="checkbox"/>			
	Jointly and Severally	<input type="checkbox"/>			
Replacement Attorneys	Solely	<input type="checkbox"/>	Jointly for some/ severally for others (details)		
	Jointly	<input type="checkbox"/>			
	Jointly and Severally	<input type="checkbox"/>			

<b>When should replacement attorneys step in?</b>		<b>Either/Or</b>		<b>Either/Or</b>	
As soon as one main attorney is unable	D1	<input type="checkbox"/>	<input type="checkbox"/>	D2	<input type="checkbox"/>
Only when all main attorneys are unable	D1	<input type="checkbox"/>	<input type="checkbox"/>	D2	<input type="checkbox"/>

NOTES including details of certain order if required

<b>People to Notify (anyone who may contest your setting up of an LPA e.g. if they are left out of your Will)</b>		
<b>Name</b>	<b>Address</b>	<b>Donor</b>

<b>Preferences – Donor 1</b>	
<b>Instructions are legally binding, preferences are guidance (e.g. care plan – allergies, likes/dislikes)</b>	
Instructions (must happen - use words such as 'must' for clarity)	
Preferences (for guidance - what you would like to happen but the attorneys are not bound by it)	

<b>Preferences – Donor 2</b>	
<b>Instructions are legally binding, preferences are guidance (e.g. care plan – allergies, likes/dislikes)</b>	
Instructions (must happen - use words such as 'must' for clarity)	
Preferences (for guidance - what you would like to happen but the attorneys are not bound by it)	

Allow attorneys access to Will?	D1		D2	
Would you like the company to act as Certificate Provider?	D1		D2	

<b>Do you wish to grant the attorneys the ability to make decisions about life-sustaining treatment?</b>	D1		D2	
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Life-sustaining treatment is care, surgery, medicine or other help from doctors that's needed to keep someone alive. For example:

- a serious operation, such as a heart bypass or organ transplant
- cancer treatment
- artificial nutrition or hydration (food or water given other than by mouth)

Whether some treatments are life-sustaining depends on the situation. For example, if someone has pneumonia, a simple course of antibiotics could be life-sustaining.

Decisions about life-sustaining treatment can be needed in unexpected circumstances. For example, if a routine operation does not go as planned and a decision needs to be made about life-sustaining treatment while the donor is under general anaesthetic.

The donor must choose who they want to make decisions about life-sustaining treatment if they do not have the mental capacity to decide themselves.

The donor has 2 options.

1. **To give their attorneys authority to give or refuse consent to life-sustaining treatment** on the donor's behalf. Choosing this option means the attorneys can speak to doctors as if they were the donor.
2. **Not to give their attorneys authority to give or refuse consent to life-sustaining treatment** on the donor's behalf. Choosing this option means doctors will make any decisions about life-sustaining treatment instead of the donor's attorneys.

**NOTES**