

The information provided on this form is confidential and once received by us, it will not be divulged to anyone other than the Partners and staff of RF&C involved with the preparation of Lasting Powers of Attorney (LPAs).

This questionnaire is designed to help you consider some of the points you should think about in connection with your LPA(s). It will greatly assist us in preparing your LPA(s) if you answer all questions in full.

1. YOUR PERSONAL DETAILS (The Donor)	
Title:	
Your full name:	
Any other names by which you may be known:	
Date of birth:	
Country of birth:	
Nationality:	
Marital Status:	<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Separated <input type="checkbox"/> Cohabiting <input type="checkbox"/> Civil Partners
Full address: (including postcode)	
Telephone number:	
Email address:	

2. TYPES OF LASTING POWERS OF ATTORNEY	
<i>There are two types of Lasting Powers of Attorney. You can choose to make one type or both.</i>	
Property and financial affairs	
Use this LPA to give an attorney the power to make decisions about money and property for you, for example: <ul style="list-style-type: none"> • managing a bank or building society account • paying bills • collecting benefits or a pension • selling your home 	<input type="checkbox"/>



<p>Health and welfare</p> <p>Use this LPA to give an attorney the power to make decisions about things like:</p> <ul style="list-style-type: none"> • your daily routine, for example washing, dressing, eating • medical care • moving into a care home • life-sustaining treatment 	<input type="checkbox"/>
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3. YOUR ATTORNEYS

The people you choose to make decisions for you are called your 'attorneys'. Your attorneys don't need special legal knowledge or training. They should be people you trust and know well. Common choices include your husband, wife or partner, son or daughter, or your best friend.

You need at least one attorney, but you can have more.

Restrictions – Attorneys must be at least 18 years old and must have mental capacity to make decisions. They must not be bankrupt or subject to a debt relief order.

Attorney 1				
Title	Full Name	Address	Date of birth	Email address (optional)
Attorney 2				
Title	Full Name	Address	Date of birth	Email address (optional)
Attorney 3				
Title	Full Name	Address	Date of birth	Email address (optional)
Attorney 4				
Title	Full Name	Address	Date of birth	Email address (optional)



4. HOW SHOULD YOUR ATTORNEYS MAKE DECISIONS?	
<i>You need to choose whether your attorneys can make decisions on their own or must agree some or all decisions unanimously. Whatever you choose, they must always act in your best interests.</i>	
I only appointed one attorney (go to question 5)	<input type="checkbox"/>
<p>Jointly and severally</p> <p>Attorneys can make decisions on their own or together. Most people choose this option because it's the most practical. Attorneys can get together to make important decisions if they wish, but can make simple or urgent decisions on their own. It's up to the attorneys to choose when they act together or alone. It also means that if one of the attorneys dies or can no longer act, your LPA will still work.</p> <p>If one attorney makes a decision, it has the same effect as if all the attorneys made that decision.</p>	<input type="checkbox"/>
<p>Jointly</p> <p>Attorneys must agree unanimously on every decision, however big or small. Remember, some simple decisions could be delayed because it takes time to get the attorneys together. If your attorneys can't agree a decision, then they can only make that decision by going to court.</p> <p>Be careful – if one attorney dies or can no longer act, all your attorneys become unable to act. This is because the law says a group appointed 'jointly' is a single unit. Your LPA will stop working unless you appoint at least one replacement attorney.</p>	<input type="checkbox"/>
<p>Jointly for some decisions, jointly and severally for other decisions</p> <p>Attorneys must agree unanimously on some decisions, but can make others on their own. If you choose this option, you must list the decisions your attorneys should make jointly and agree unanimously. The wording you use is important.</p> <p>Be careful – if one attorney dies or can no longer act, none of your attorneys will be able to make any of the decisions you've said should be made jointly. Your LPA will stop working for those decisions unless you appoint at least one replacement attorney. Your original attorneys will still be able to make any of the other decisions alongside your replacement attorneys.</p>	<input type="checkbox"/>

5. REPLACEMENT ATTORNEYS
<p><i>This section is optional, but we recommend you consider it</i></p> <p><i>Replacement attorneys are a backup in case one of your original attorneys can't make decisions for you any more.</i></p> <p><i>Reasons replacement attorneys step in</i> – if one of your original attorneys dies, loses capacity, no longer wants to be your attorney, becomes bankrupt or subject to a debt relief order or is no longer legally your husband, wife or civil partner.</p> <p><i>Restrictions</i> – replacement attorneys must be at least 18 years old and have mental capacity to make decisions. They must not be bankrupt or subject to a debt relief order.</p>



Replacement attorney 1				
Title	Full Name	Address	Date of birth	Email address (optional)
Replacement attorney 2				
Title	Full Name	Address	Date of birth	Email address (optional)

6. WHEN CAN YOUR ATTORNEYS MAKE DECISIONS?	
<p><i>You can allow your attorneys to make decisions:</i></p> <ul style="list-style-type: none"> • as soon as the LPA has been registered by the Office of the Public Guardian • only when you don't have mental capacity <p><i>While you have mental capacity you will be in control of all decisions affecting you. If you choose the first option, your attorneys can only make decisions on your behalf if you allow them to. They are responsible to you for any decisions you let them make.</i></p> <p><i>Your attorneys must always act in your best interests.</i></p> <p style="text-align: right;"><i>(Tick one only)</i></p>	
<p>As soon as my LPA has been registered (and also when I don't have mental capacity)</p> <p>Most people choose this option because it is the most practical. While you still have mental capacity, your attorneys can only act with your consent. If you later lose capacity, they can continue to act on your behalf for all decisions covered by this LPA.</p> <p>This option is useful if you are able to make your own decisions but there's another reason you want your attorneys to help you – for example, if you're away on holiday, or if you have a physical condition that makes it difficult to visit the bank, talk on the phone or sign documents.</p>	<input type="checkbox"/>
<p>Only when I don't have mental capacity</p> <p>Be careful – this can make your LPA a lot less useful. Your attorneys might be asked to prove you do not have mental capacity each time they try to use this LPA.</p>	<input type="checkbox"/>

7. LIFE-SUSTAINING TREATMENT (Health and Welfare LPA only)

You must choose whether your attorneys can give or refuse consent to **life-sustaining treatment** on your behalf.

Life-sustaining treatment means care, surgery, medicine or other help from doctors that's needed to keep you 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. If you had pneumonia, a simple course of antibiotics could be life-sustaining. Decisions about life-sustaining treatment can be needed in unexpected circumstances, such as a routine operation that didn't go as planned.

Do you wish for your attorneys to give or refuse consent to life-sustaining treatment on your behalf?

Yes

No

8. PREFERENCES AND INSTRUCTIONS

This section is optional

You can tell your attorneys how you'd **prefer** them to make decisions, or give them specific **instructions** which they must follow when making decisions. Most people leave this section blank – you can just talk to your attorneys so they understand how you want them to make decisions for you.

Preferences – use words like 'prefer' and 'would like'

Instructions – use words like 'must' and 'have to'

9. LPA's STORAGE

Your new LPA(s) is very important and must be safely and securely stored. If lost or damaged, it may be hard for your attorneys to make decisions on your behalf without providing the original documents.

Should you require, we can securely store your LPA(s) in our vault. We have latest security measures in place, including fire and intruder alarm protection and CCTV coverage to ensure the safety and security of your documents.

You will be issued with a copies/scans of your LPA(s) for you to keep at home. You and your attorneys will receive a document explaining where your original LPA(s) is stored and the procedure for releasing it.

Would like Ronald Fletcher & Co LLP to securely store your LPA(s) in our vault?

- Yes (Additional charges apply. Please ask for more information.)
- No

Signed:

Print name:

Dated:

Please return the completed form to Ronald Fletcher & Co LLP via the email address below or bring it along to your appointment. If required, please include any additional information on a separate sheet. Thank you for your assistance.