client
LEGAL SOLUTIONS

INFORMATION SHEET & CHECKLIST

How Enduring Powers of Attorney can keep you safe

Enduring Powers of Attorney (aka EPOA) are simple legal tools that let you appoint someone you trust to look after your personal or financial affairs – if the day ever comes that you can't.

Planning ahead, while you can

We often hear from clients who want to know how their affairs would be managed if they lost mental capacity. Through age, illness or accident, someone can reach the point where they can no longer handle their own affairs — so it's worth deciding, in advance, who you would want to step in.

Without an EPOA in place

A family member would usually have to apply to the Family Court to be appointed manager of your property and welfare guardian — supported by medical evidence that you have become mentally incapable. This can mean:

- Greater expense and delays that can be stressful for family and friends.
- The person the Court appoints may not be who you'd have chosen.

01 — PROPERTY

Property EPOA

Covers financial and property matters. Prepared in advance, it can be activated immediately and keeps working after you can no longer deal with your own affairs. One or more people can act together.

02 — PERSONAL

Personal Care & Welfare EPOA

Covers health, welfare and lifestyle decisions. Takes effect only once a medical professional or the Family Court confirms you can no longer decide for yourself. Only one person can be appointed.

Why set one up now?

The process is relatively simple, and it lets you choose the person you trust. Most clients set up both EPOAs, at any age — and especially when buying a home or other assets. Your EPOA lasts only while you are alive.

Your EPOA checklist

If you'd like us to draft your EPOAs, it helps to have these details ready before we meet.

PROPERTY MATTERS

1. Who you wish to appoint as your attorney — full name, address, phone and email. Multiple people can act; tell us if they must act unanimously.
2. Your successor (backup) attorney's name and contact details.
3. Any properties or assets the attorney should *not* oversee.
4. Anyone the attorney should consult when making decisions.
5. Anyone your attorney should give information to on request.
6. Activation preference - per below.
7. Any further directions for your attorneys.

PERSONAL CARE & WELFARE

1. Who you wish to appoint as your attorney — full name, address, phone and email. Only one attorney can be appointed for this role.
2. Your successor (backup) attorney's name and contact details.
3. Your consultation preferences for care and welfare decisions.
4. Anyone your attorney should give care and welfare details to on request.
5. Any additional instructions for your welfare EPOA.

WHEN SHOULD IT ACTIVATE?

Immediately — convenient and flexible for day-to-day tasks or overseas travel, but carries some risk of misuse.

On mental incapacity — keeps you in control and protected, though determining incapacity can involve delays.

CURIOUS ABOUT COST?

Scan to see our fixed fees for EPOAs on our website.

SCAN ME

https://www.clientlegalsolutions.co.nz/our-fixed-fees

READY TO GET UNDERWAY?

SCAN ME

Use our questionnaire to send us your details and ideas, and we'll take it from there.
Access the questionnaire or scan the QR code.

We'd love to give you peace of mind, and get your EPOAs sorted

To have your EPOAs drawn up, or for advice, chat with us.

chatwithus@clientlegal.co.nz

NELSON
03 548 2269
315 Hardy Street
Nelson

MOTUEKA
03 528 9580
279 High Street
Motueka