

Lasting powers of attorney questionnaire

Though none of us like to think about losing the ability to manage our own affairs, it can happen. It is important to put arrangements in place so that others can make decisions for us should the need arise. You do that through a lasting power of attorney (commonly referred to as an LPA).

Before we meet to discuss making an LPA, it would be useful if you could complete this form for us to consider ahead of the appointment. Please save this document to your computer before you begin working on it, and once complete, email a copy to us.

We will review your questionnaire within 2 working days of receipt and one of the team will get in touch with you to arrange an appointment if you do not have one in place already. You should allow approximately 1 hour for the appointment.

Are you completing this form for yourself or on behalf of someone else?

For myself ☐ For someone else ☐

If you are completing this on behalf of someone else can you please tell us why.

About you

Title

Full name

Date of birth

Address

Postcode

Telephone No. Mobile No.

Email address

Have you made an appointment with us already?

☐ Yes ☐ No

If no, what is the preferred way you'd like us to contact you to make an appointment:

☐ Phone ☐ Email ☐ Either way

About your appointment

I wish to appoint attorneys to make decisions about my:

(please tick all that apply)

☐ Property & financial affairs

☐ Health and welfare

☐ Business assets

The three LPAs are completely separate: you can choose to make one or more, depending on your circumstances and needs. For more information about the different types of LPAs please read our LPA guide or we can discuss these options when we meet.

Have you made a will within the last 5 years?

☐ Yes ☐ No

Is there is anything else you'd like us to know ahead of your appointment with us?

Thank you for completing this questionnaire which provides us with a little information about how our wills, trusts & probate team can help.

We will need some further information when we meet. We will provide you with details of this when we contact you to confirm your appointment.

If you would like to know how we handle your personal data please read our privacy policy on our website, or ask the team for a copy.

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