Checklist:
Getting EPA Ready

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decision support service®

Before you start your enduring power of attorney (EPA) application, check that you have the information below.

If you have any queries when completing this checklist please contact our dedicated EPA helpdesk by calling Freephone: +353 (01) 211 9750 or by emailing epahelpdesk@decisionsupportservice.ie

Your details (the donor):

Your name: _____

Your date of birth: _____

Your email: _____

Your address: _____

Your main attorney details:

How many main attorneys do you want to appoint? _____

Main attorney one

Attorney(s) name: _____

Attorney(s) date of birth: _____

Attorney(s) email: _____

Attorney(s) address: _____

Main attorney two

Attorney(s) name: _____

Attorney(s) date of birth: _____

Attorney(s) email: _____

Attorney(s) address: _____

Main attorney three

Attorney(s) name: _____

Attorney(s) date of birth: _____

Attorney(s) email: _____

Attorney(s) address: _____

If you are appointing more than three attorneys, you can use the Notes section on the last page to record their information.

Your replacement attorney?

Are you appointing a replacement attorney(s)?

Yes ☐ OR No ☐

If yes, please check that you have the information below for your replacement attorney details.

Your replacement attorney details:

How many replacement attorneys do you want to appoint? _____

Replacement attorney one

Replacement attorney(s) name: _____

Replacement attorney(s) date of birth: _____

Replacement attorney(s) email: _____

Replacement attorney(s) address: _____

Replacement attorney two

Replacement attorney(s) name: _____

Replacement attorney(s) date of birth: _____

Replacement attorney(s) email: _____

Replacement attorney(s) address: _____

Replacement attorney three

Replacement attorney(s) name: _____

Replacement attorney(s) date of birth: _____

Replacement attorney(s) email: _____

Replacement attorney(s) address: _____

If you have replacement attorney(s) when should they act?

When one attorney is unable to act ☐

OR

When there is no attorney remaining who is able to act ☐

If you are appointing more than one replacement attorney, is there any order in which you would like your replacement attorneys to act?

_____

_____

How will your attorneys make decisions?

If you are appointing more than one attorney, how would you like them to make decisions?

Jointly for all decisions ☐

OR

Jointly and severally for all decisions ☐

OR

Jointly for some decisions, and jointly and severally for some decisions ☐

Note: If you choose the option 'jointly for some decisions, and jointly and severally for some decisions' you will need to say what decisions are to be made jointly and what decisions are to be made jointly and severally in your application.

Attorney remuneration:

Do you want to pay your attorney(s)?

Yes ☐ OR No ☐

If yes, then:

How much? _____

How often? _____

For what? _____

Decision types:

What type of authority do you want to give your attorneys?

Personal welfare:

☐ General authority

OR

☐ Specified authority

Property and affairs:

☐ General authority

OR

☐ Specified authority

Are there any conditions, exclusions, or exceptions that you wish to include in your enduring power of attorney?

_____

_____

_____

Gifting:

Would you like your attorneys to be able to make gifts on your behalf to family and friends on customary occasions, or make gifts to charities you would like to donate to?

Yes ☐ OR No ☐

If yes, then:

What is being gifted? _____

_____

When is this gift being given? _____

_____

How often are you giving this gift? _____

_____

If you choose general authority your attorney(s) will be able to make all of the decisions listed below. If you choose specified authority you will need to list out each decision in your application that you wish to be included in your enduring power of attorney.

Personal welfare decisions:

Personal welfare decisions can include decisions regarding:

- accommodation, including whether or not the donor should live in a designated centre;
- participation by the donor in employment, education or training;
- participation by the donor in social activities;
- decisions on any social services provided or to be provided to the donor;
- healthcare;
- participation by the donor in healthcare research and social care research except in relation to clinical trials of medicinal products for human use or clinical investigations undertaken to assess the safety or performance of medical devices;
- other matters relating to the donor's well-being.

Note: Healthcare decisions cannot include decisions about consent to or refusal of treatment.

Property and affair decisions:

Property and affair decisions can include decisions regarding:

- the custody, control and management of some or all of the donor's property or property rights;
- the sale, exchange, mortgaging, charging, gift or other disposition of the donor's property;
- the acquisition of property by the donor, or on his or her behalf;
- the carrying on, on behalf of the donor, of any profession, trade or business which may lawfully be carried on by a person other than the donor;
- the making of a decision which will have the effect of dissolving a partnership in which the donor is a partner;
- the carrying out of any contract entered into by the donor;
- the discharge of the donor's debts, tax and duty liabilities and obligations or other obligations;
- the execution or exercise of any of the powers or discretions vested in the donor as a tenant for life;
- providing, to the extent that the donor might have been expected to do so, for the needs of other persons;
- the conduct of proceedings before any court or tribunal, whether in the name of the donor or on his or her behalf;
- making an application for housing, social welfare or other benefits or otherwise protecting or advancing the interests of the donor in relation to those matters.

Note: If you want to give your attorney authority to be able to gift any of your property to others, you must specify this in your enduring power of attorney, even if you are giving your attorney general authority in relation to your property and affairs.

Notes