

FORM 2 – ATTORNEY’S RECORD KEEPING

You should update this blank form every time you act under the authority of the POA. This will help you keep track of the donor's finances and property you handle as attorney. It will also keep your records up to date. You can change this form to fit your situation as needed. Be ready to give these records and receipts when asked or required.

Name of Donor:					
Statement of assets prepared on:					
Asset (describe below)	Value	Location	Insurance	Loans or financing payments	Bills
Total					

Assets are anything worth money, e.g. property, bank accounts, cash on hand, investments, vehicles, jewellery, etc.

Name of Donor:				
Statement of liabilities prepared on:				
Liabilities (describe below)	Debt	Payments	Account number	Insurance
Total				

Liabilities are anything the donor owes or has agreed to pay on someone else’s behalf (usually called co-signing or personal guarantee).

Monthly Records and Receipts

[illegible]