ALA LAW

YOUR FAMILY & ESTATES LAWYERS

ESTATE PLANNING CHECKLIST

Preparing for Your Power of Attorney Appointment



A simple checklist to help you decide who to appoint, how they should act, and what to bring to your meeting.

Use this checklist before your appointment with our estate planning team. You don't need to have every answer – just note what you know, and we'll talk through the rest with you.

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Before your appointment

Tick each item as you complete it. Bring this checklist and any documents with you to your meeting.

Item	Done
1. About you	
Your full name, date of birth, address and phone number	☐
Photo identification (driver licence or passport)	☐
Copies of any existing Power of Attorney, Enduring Guardianship, Advance Care Directive or Will Making a new Power of Attorney does not automatically cancel an earlier one, so we need to see what you already have.	☐
2. Your attorney(s)	
Who would you like to appoint as your attorney? Choose someone you trust to manage your money and property honestly and in your best interests.	☐
Their full names, addresses and occupations	☐
Do you want to appoint more than one attorney? If so, should they act together (jointly), separately (severally), or either way (jointly and severally)?	☐
Who would you like as an alternate (substitute) attorney if your first choice cannot act?	☐
Have you asked your attorney(s) whether they are willing to take on the role?	☐
3. Type of Power of Attorney and timing	
Do you need a **General** Power of Attorney (for example, while you are travelling) or an **Enduring** Power of Attorney (which continues if you lose capacity)?	☐
When do you want it to start? For a specified timeframe · for a specific event · once you lose capacity · from when your attorney accepts	☐
4. Limits and conditions	
Do you want to limit what your attorney can do (for example, only certain accounts or property)?	☐
Do you have a spouse or minor children? Do you want provision made for them in your Power of Attorney?	☐
Do you want your attorney to be able to make gifts or provide for others from your assets? Your attorney can only do this if your document expressly allows it.	☐
Will your attorney need to deal with real estate? List any property you own (in NSW, interstate or overseas) A Power of Attorney must be registered with NSW Land Registry Services before it can be used for NSW land dealings.	☐

Item	Done
5. Your other estate planning documents	
Is your Will up to date? Many clients update their Will at the same time.	☐
Would you like to appoint an Enduring Guardian for health and lifestyle decisions? A Power of Attorney covers financial and legal decisions only.	☐
Would you like to record your medical treatment wishes in an Advance Care Directive?	☐
6. On the day	
Bring your photo ID, this checklist and copies of any existing documents	☐
Your solicitor will explain the document and witness your signature as a prescribed witness	☐
Your attorney will need to sign to accept the appointment of an Enduring Power of Attorney – we'll explain how this works	☐

Questions for your solicitor

Ready to appoint your Power of Attorney?

Our experienced estate planning solicitors in Penrith can help you choose the right type of Power of Attorney and prepare it correctly.

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This checklist provides general information only about Powers of Attorney in New South Wales and is not legal advice. Your circumstances may differ, so please speak with one of our solicitors before making decisions. Information current as at November 2026.