Powers of Attorney & Health-Care Planning Worksheet

Free printable planning worksheet • NOT a legal document or software-generated form

Planning overview

Client or matter reference

State and existing instruments to review

Financial authority

Preferred financial agent and alternate

Authority or timing instructions for attorney review

Health-care planning

Preferred health-care agent and alternate

Important health-care preferences to discuss

Privacy / information releases

People who may need health-information access

Existing HIPAA authorization or prior directive

Attorney review

Capacity, agent suitability or special issues

Document and execution questions

Use for discussion and internal intake only. This worksheet does not create, replace or execute a will, trust, power of attorney or advance directive. Verify all content and signing requirements under applicable state law.