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Free Legal Resource · 2026

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Power of Attorney Checklist

Action Checklist — ClearLegalTips.com (2026)

Set up your financial POA so your agent can act when needed.

Choose

Named your agent and an alternate

Decided which powers to grant

Chose durable or non-durable

Scope

Set when the POA takes effect

Limited any powers you want restricted

Set an expiration if desired

Execute

Signed before a notary

Witnessed if your state requires

Gave copies to your agent and bank

Notes

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vary by state and change over time. Consult a licensed attorney for advice specific to your situation.