



Choosing an Agent

When you grant a power of attorney, you want to name the right agent. But you may not be certain how to identify that person. One approach is to set some basic criteria focusing on essential characteristics. Then ask yourself a series of questions that help you determine if a prospective agent meets those criteria.

1. Most important, do you trust the person to always act in your best interest? Can past experiences back that up?
2. Does the person live fairly close by or is he or she able to travel quickly if needed?
3. Is the person in good health?
4. Is the person confident in his or her own judgment?
5. Does this person make an effort to evaluate a situation before making a decision?
6. Will the person respond effectively to criticism about his or her decisions or to potential conflict?
7. Does the person communicate well with many different types of people?
8. Will you be comfortable sharing the details of your financial situation with this person?
9. Will you be comfortable having a serious discussion with the person about your wishes for end-of-life care? How will you react if he or she disagrees with your views?
10. Can you think of any reason that naming this person might not be a good idea?

It may be that you already have a person in mind to name as your agent. But before you make a final decision, you should probably see how he or she scores on this list of questions. Or, if there are two well-qualified candidates with different strengths, you may want to grant one power of attorney for finance and the other power of attorney for healthcare.