# ORDER FORM

## Use this form to order your Level III™ Planning Type Financial Power of Attorney

**Please indicate below your choice(s) of whom you want to make financial decisions for you.**

**Instructions:**

1. Complete form – fill in the Principal and Agents' name.
2. **If you have not already paid, please make a check out to:**
   **Attorney Timothy P. Crawford for $250 (for each document)**.
3. **Mail this form and the check back to my office at: 840 Lake Avenue, Racine, WI 53403**
4. I will then prepare the documents.
5. I will arrange for you to sign.

**Complete the following information:**

- **Principal** is the person for whom we are preparing the Financial Power of Attorney for. (you)
- **Agent** is the person who will handle financial decisions for you when you are unable to make decisions for yourself. Could be a spouse or a child (18 or older). Your first choice for Agent is generally your spouse. The second choice for Agent is generally your oldest child.

**YOU NEVER WANT TO HAVE 2 PEOPLE SERVING AT THE SAME TIME.**

**PRINCIPAL:** ______________________________________________
(Yourself) Name Email Address

______________________________________________
Address Phone Number

**AGENT:** ______________________________________________
(First Choice) Name Email Address

______________________________________________
Address Phone Number

**BACK UP AGENT:** ______________________________________________
(Second Choice) Name Email Address

______________________________________________
Address Phone Number

If you have any questions on completing this form, please call Nina at (262) 634-6659.

# SOME HELPFUL HINTS

## Why do I need this document?

Without a **Level III™ Planning Type Financial Power of Attorney**, if you become incompetent, your loved ones would need to go to Court. The Probate Court Judge could select a total stranger to run your financial affairs. By signing this document, you get to select who you want to run your financial matters if you are unable to do so. You could save you thousands of dollars by taking 10 minutes to do this planning now.

## Who should I select?

Generally, you will select your spouse as your Agent under your Level III™ Planning Type Financial Power of Attorney. The spouse is the one that is probably the most familiar with your financial affairs. However, if your spouse were to die or become incompetent, you want to have a person that could automatically replace your spouse for making the financial decisions for you.

When selecting a replacement for your spouse you will generally pick a child. However, it could be a brother or sister of yours, or another family member. It could also be a non-relative, like a friend or neighbor.

You do not want to have 2 Agents acting at the same time. The difficulty of when you have 2 acting at the same time is they would need to both be present when they are trying to use the document. This is very difficult to accomplish. The reason I am given by clients when they want to name 2 Agents to serve at the same time is they do not want to get a child upset. My experience has been that the child that is not selected will not be disappointed.

My suggestion for selecting your Agent to replace your spouse is:

Select the one you think could best handle making your financial decision; or
Select the one that lives closest to you; or
Select the oldest.

I hope the above information will help you to make a decision about who you should name as the Back Up Agent in case your Agent dies.