



Power of Attorney Information

A Power of Attorney (POA) is a legal document that authorizes an individual (the *Agent*) to act on behalf of another person (the *Principal*) in financial, legal, or healthcare-related matters. Individuals representing a loved one will be required to provide valid Power of Attorney documentation to conduct business, make decisions, or communicate on the Principal's behalf.

To ensure proper authorization, representatives must submit a complete and current copy of the Power of Attorney to the Stock Transfer Office. The document must clearly identify the Agent, specify the scope of authority granted, and confirm that the Power of Attorney is currently in effect. Please note that some institutions may require additional verification or may not accept certain limited or expired forms of authority.

Power of Attorney Documentation Checklist:

- Complete copy of the **notarized** Power of Attorney document
 1. Document clearly identifies the Agent(s) and Principal
 2. Scope of authority is clearly stated
 3. Power of Attorney is currently valid and in effect
 4. Document is signed and properly executed in accordance with state law
- Valid government-issued photo identification for the Agent
- Any additional documents required to verify authority (if applicable)
- Power of Attorney (POA) Review Fee: \$90**
 - Additional POA Review (if required): \$75

Important Notice:

A Power of Attorney is valid only during the lifetime of the individual granting the authority. All powers and authority under a Power of Attorney automatically terminate upon the death of the Principal. After death, only a legally appointed executor, administrator, or trustee may act on behalf of the individual's estate.

Difference Between a Power of Attorney vs. Executor of an Estate

- A Power of Attorney provides authority **before** death
- An Executor has authority **after** death.

These roles are separate, and one does not replace or continue the authority of the other.