**Power of Attorney Checklist**

Name of Principal:

Current customer? Yes No

Date Power of Attorney was acknowledged:

Name(s) of Agent(s)/Attorney(s) in Fact:

1. If POA is acknowledged before November 1, 2021, is more than one Agent is named? Yes  No.

If Yes, does the POA state the Agents may act independently? Yes

\_\_\_\_\_ No  
If No, is there an “and” or “&” between the names? \_\_\_\_ Yes No

If Yes, the Agents must act conjointly

1. If POA is acknowledged on or after November 1, 2021, unless the POA specifically requires the Agents act conjointly, each may act independently regardless of whether “and” or “&” is between the names.

Is one or more a successor/substitute Agents named? Yes No

If “Yes,” name(s) of successor(s)/substitute(s) and any conditions required to occur for succession/substitution:

Type of POA:

General (no durability) Effective date:

Durable – must contain specific statement if acknowledged before November 1, 2021.

If acknowledged on or after November 1, 2021, the POA is durable unless it specifically states that is not durable.

Springing Effective upon

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(Indicate date or occurrence which must occur for the POA to become effective)

Limited Effective date:

Describe limitations:

Other Effective date and additional info:

POA accepted by bank Yes No

If No, reason for refusal:

Bank is not otherwise required to engage in a transaction with the principal in the same circumstances because

Engaging in a transaction with the agent or the principal in the same circumstances would be inconsistent with federal law because ;

The bank has actual knowledge of the termination of the agent's authority or the death of the principal.

A request for a certification, a translation or an opinion of counsel under subsection D of Title 58 O.S. § 3019 was refused on (date)

The Bank in good faith believes that the power is not valid or that the agent does not have the authority to perform the act requested, whether or not a certification, a translation or an opinion of counsel under subsection D of Section Title 58 O.S. § 3019 has been requested

Or

The Bank has made or has actual knowledge that another person has made, a report to the Adult Protective Services office stating a good-faith belief that the principal may be subject to physical or financial abuse, neglect, exploitation or abandonment by the agent or a person acting for or with the agent.