



General Duties Of An Attorney

- If the grantor is mentally capable, discuss expectations and your responsibilities as an attorney and keep them informed of what you are doing for them.
- Retain original POA (Power of Attorney) document unless the POA is specific to a third party, e.g. a bank, and the third party keeps the original.
- Create a list of the grantor's assets and liabilities when your Power of Attorney has been established, including grantor's bank accounts, investments, bonds, stocks, debt etc.
- Create a plan and make financial arrangements as necessary, to meet the grantor's financial needs.
- Make routine payments of the grantor's liabilities and debts directly from the grantor's account.
- Keep detailed financial records to show all purchases and payments made on the grantor's behalf.
- Keep the grantor's financial affairs and property separate from your own.
- Keep the grantor's information private except if you need to release information to perform your duties.

For further information related to any of your duties, in addition to obtaining legal advice, the following resources are available on the Government of Canada site:

Being named as somebody's power of attorney: <https://www.canada.ca/en/financial-consumer-agency/services/caring-someone-ill/named-attorney.html>

Powers of Attorney: rights and responsibilities: <https://www.canada.ca/en/financial-consumer-agency/services/rights-responsibilities/rights-banking/rights-power-attorney.html>

If you have specific questions about handling the grantor's affairs at CIBC, please [contact the grantor's banking centre or advisor](#).