



how to avoid problems

do

- Book an appointment to speak to a member of staff. Explain that you need to register a power of attorney and ask them what documents you need to bring in.
- Tell the bank anything they might need to know that will make it easier for them to help you. If you're concerned about the mental capacity of the person you're acting for, it makes sense to let them know.
- Explain if there are any financial matters that might mean you need to get the power of attorney processed urgently. Though the bank shouldn't skip any steps, they may be able to help you avoid a difficult situation.

don't

- Hand over original copies of your documents. If the staff member is unsure, show them this guidance and ask them to contact their staff helpline or a manager.
- Get upset. Managing someone's finances can be difficult, especially if they're losing their mental capacity. But if you find you're hitting a brick wall, ask if you can speak to the manager or call the Office of the Public Guardian on 0300 456 0300. They can explain to you and the bank what they should be doing.
- Insist on the donor being present. They might have health problems that make this difficult.