



**PLEASE ANSWER ALL APPLICABLE QUESTIONS IN FULL**

<b>Management of Affairs for:</b> (full name of the person who appointed you attorney - the Donor)	
<b>Your full name:</b>	
Your Address:	
Your Telephone Number:	
Your Email Address:	

**Donor's authority**

The donor must give their authority to the documents being released to you, otherwise we will require confirmation of their lack of capacity.

I confirm my approval to the below documents being released to my Attorney(s).

<b>Donor</b>	Signed:	.....
	Print Name:	.....
	Dated:	.....

**If the donor cannot give consent**

If the donor is unable to give their consent (usually due to a loss of mental capacity), please provide confirmation of their lack of capacity from a doctor or other suitable medical professional. Please contact us on 01252 733 770 or at [documentrelease@baker-law.co.uk](mailto:documentrelease@baker-law.co.uk), with any queries.

## DOCUMENTS TO BE RELEASED

Please tick all that apply:

- All Powers of Attorney (Enduring or Lasting)
- A certified copy of the Enduring Power of Attorney
- A certified copy of the LPA for Property & Finances
- A certified copy of the LPA for Health & Welfare
- Copy Will

### **Requesting copy of the Donor's Will**

If you are requesting a copy of the Donor's Will, and we do not hold the original Power of Attorney under which you are appointed, you must provide a certified copy of the original Power of Attorney document to confirm your appointment and authority to request/receive a copy of the Will.

Tick here if you are enclosing a certified copy of the document(s) under which you are appointed.

## ATTORNEYS COLLECTING DOCUMENTS

### **Collecting original documents ONLY**

If you are requesting release of original Power of Attorney document(s), we require authority and ID from ALL attorneys, even if you are appointed jointly & severally. (Please see page 4 & 5 for details of the required authority).

If any Attorneys have passed away, you will need to provide a copy of their death certificate. (If you are only requesting certified copies, or copy documents, this section does not apply to you. Please continue to page 4.)

Is there more than one Attorney?

- YES - continue to the next question.
- NO - complete checklist on page 6, then you have finished this form.

Are ALL of the Attorneys collecting the documents?

- YES - ALL Attorneys must sign on page 3 and then continue to page 5.
- NO - continue below.

How are the Attorneys appointed?

- Jointly - continue below.
- Jointly and severally - ALL collecting attorneys must sign on page 3.

### **Joint Attorneys**

If you are appointed to act jointly, we require authority from ALL attorneys to release any documents.

ALL non-collecting Attorneys must complete and sign Option A on page 3.

**Please tick the appropriate box for your request:**

Joint Attorneys

We understand that Baker Law LLP requires authority from ALL jointly appointed Attorneys to release documents to us and we enclose the relevant signed authority for each Attorney who will NOT be collecting the documents indicated on page 2.

Collecting original documents

I/We understand that Baker Law LLP requires authority from ALL living Attorneys to release original documents to me/us and I/we enclose the relevant signed authority/copy death certificate (joint and several only) for each Attorney who will NOT be collecting the documents indicated on page 2.

<b>Attorney 1</b>	Signed: ..... Print Name: ..... Dated: .....
<b>Attorney 2</b>	Signed: ..... Print Name: ..... Dated: .....
<b>Attorney 3</b>	Signed: ..... Print Name: ..... Dated: .....
<b>Attorney 4</b>	Signed: ..... Print Name: ..... Dated: .....

ATTORNEYS NOT COLLECTING DOCUMENTS

**OPTION A:**

Authority to Release from non-collecting Attorney

Non-collecting Attorney 1:

I ..... am one of the Attorneys named in the Power of Attorney of the above-named donor and authorise and request Baker Law LLP to release the documents requested above, held on behalf of the above named donor, to the above-named Attorney.

**Signed:** .....  
Print Name: .....  
Dated: .....

Non-collecting Attorney 2:

I ..... am one of the Attorneys named in the Power of Attorney of the above-named donor and authorise and request Baker Law LLP to release the documents requested above, held on behalf of the above named donor, to the above-named Attorney.

**Signed:** .....  
Print Name: .....  
Dated: .....

Non-collecting Attorney 3:

I ..... am one of the Attorneys named in the Power of Attorney of the above-named donor and authorise and request Baker Law LLP to release the documents requested above, held on behalf of the above named donor, to the above-named Attorney.

**Signed:** .....  
Print Name: .....  
Dated: .....

**OPTION B:**

Deceased Attorney(s). (Joint and several ONLY)

I/we confirm that the Attorney(s) who will not be collecting original documents from Baker Law LLP has/have died.

I/we enclose copy death certificates for all deceased Attorneys for your information.

<b>Deceased Attorney 1</b>	Full name: .....
<b>Deceased Attorney 2</b>	Full name: .....
<b>Deceased Attorney 3</b>	Full name: .....

## Identification Requirements

### All living Attorneys must provide:

- One item from list A.
- One item from list B.

#### List 'A' (to confirm name/identity)

- Current full signed passport
- Current UK photo card driving licence (full or provisional)
- HMRC tax code notification
- Original notification letter from DWP/Benefits Agency confirming rights to benefits

#### List 'B' (to confirm address)

- Current council tax bill
- Bank/building society/credit union passbook or statement not more than 3 months old showing current address
- Current UK photo card driving licence (full or provisional)
- Local council rent card or tenancy agreement
- Utility bill (NOT RELATED TO MOBILE PHONE) – not more than 3 months old
- Most recent original mortgage statement from a recognised lender
- Original notification letter from DWP/Benefits Agency confirming right to benefits

### Next Steps:

#### 1) Send us any of the following that apply:

- **This form (completed)**
- **Copies of ID for all living Attorneys**
- **Copy Renunciations for non-collecting Attorneys**
- **Copy death certificates for deceased Attorneys**

2) We will then contact you (within 10 working days) to arrange an appointment for you to collect the documents from our office.

3) At the appointment we will provide you with the original document(s) and you will be asked to sign a receipt.

### Checklist:

- Page 1: completed and signed by all collecting Attorneys
- Page 2: completed
- Pages 3 & 4: Options A or B completed and signed for all non-collecting Attorneys.
- Copy Death Certificates enclosed (joint and several only).
- Copy ID enclosed for ALL living Attorneys of the estate.

Please return this form to us by either email to  
**documentrelease@baker-law.co.uk**

or by post to

Private Client Document Release  
BakerLaw LLP, Gostrey House,  
Farnham, Surrey, GU9 7PT

We will review your form and contact you within 10 working days.