

# Power of Attorney Monitor Agreement

This document is attached to and part of the Power of Attorney dated \_\_\_\_\_ 20\_\_\_\_, signed by Principal \_\_\_\_\_.

1. Principal appoints \_\_\_\_\_ to serve as a Monitor for the Power of Attorney, effective immediately. Monitor agrees and accepts appointment by signing below.
2. Monitor shall serve until revoked or replaced by Principal, or Monitor resigns or is incapacitated, or Power of Attorney is revoked, terminated or expires.
3. Monitor shall have the authority to view, request, receive and compel the Agent to provide, within \_\_\_\_\_ days, a record of all receipts, disbursements, transactions, investments, gifts, bills, statements, contracts and related documents and email, sent, received, done or entered into by the Agent on behalf of the Principal, and to request and receive such records held by third parties, and to request and receive a copy of the Power of Attorney. Records may be in paper or electronic form.
4. Monitor shall have the right to question the Agent regarding any matter involving information, statements or documents received from Agent, or decisions made by Agent. Agent shall respond within \_\_\_\_\_ days with an answer, or the requested records or information.
5. Monitor shall not have the power to appoint Monitor as Agent, but Principal may appoint Monitor as Agent, Successor Agent or Co-Agent.
6. [initial choice] Monitor shall \_\_\_\_\_ shall not \_\_\_\_\_ have the power to remove, suspend or replace Agent, if needed, to protect Principal from loss, exploitation, dishonesty, neglect or incompetence.
7. Monitor is authorized to show and discuss information and records with the Principal, an attorney, notary, accountant, bookkeeper, recordkeeper, auditor, bank, lender, broker, financial advisor, daily money manager, tax preparer, insurance agent, real estate agent, beneficiary, contractor, vendor, merchant, Certified Fraud Examiner, social services, health care provider, Adult Protective Services, government agency, court or law enforcement, as needed, acting in the best interest of the Principal.
8. Monitor shall be considered to be a fiduciary, acting for the Principal.
9. Monitor shall receive compensation for services rendered, of \$\_\_\_\_\_ per month, plus reimbursement of reasonable and necessary expenses. Monitor shall submit periodic status reports.
10. Principal shall indemnify and hold harmless the Monitor from liability if Monitor acts in good faith and obeys laws, rules, regulations and agreements. Liability of Monitor may include compensation received.
11. Special Instructions: \_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
Signature of Principal

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Monitor

\_\_\_\_\_  
Date

\_\_\_\_\_  
Monitor's Address

\_\_\_\_\_  
Phone

\_\_\_\_\_  
City, State, Zip Code

\_\_\_\_\_  
Email

State of \_\_\_\_\_

County of \_\_\_\_\_

Acknowledged before me on this date \_\_\_\_\_, 20\_\_\_\_, by \_\_\_\_\_, Principal.

\_\_\_\_\_  
Notary

Notary Seal