

LASTING POWERS OF ATTORNEY · A COUPLE

LPA instructions

Section 01 is all Aaron needs to open the file and confirm the fee. The rest is what he goes through with you, and a blank is an answer.

HOW THIS WORKS

- 01 Fill in section 01**
One page. That alone is enough for Aaron to open the file and confirm the fee.
- 02 Send it back**
Save the file and email it to aaron@safeharbour.legal, or bring it with you.
- 03 One conversation**
Aaron reads it first, so the meeting is spent on decisions rather than on gathering facts.
- 04 Signing, then registering**
Everyone signs in a fixed order, which Aaron sets out. The Office of the Public Guardian then registers it, and it cannot be used until they have.

WHAT IT COSTS

Both lasting powers of attorney each	£1,400 + VAT, so £1,680
DRAFTING AND SIGNING 1 TO 2 WEEKS; REGISTRATION 8 TO 10 WEEKS (GOV.UK)	
One lasting power of attorney each	£800 + VAT, so £960

WHO AARON ACTS FOR

Each of you, as the person giving the power away. Aaron sees each of you on your own for part of the appointment, and takes instructions from you and not from an attorney.

The registration fee above is the Office of the Public Guardian's, not Safe Harbour's, and carries no VAT. It is charged on each power, so four powers between the two of you means four of them. A reduced fee or none applies on a low income, and Aaron applies for it. Your wills cost £150 less when your powers of attorney are done at the same time, because the meetings, identity checks and signing happen once. Every figure is plus VAT at 20 per cent, and the figure with VAT is beside it. Fees reviewed 14 September 2026. What the fee covers, what it does not and anything paid to somebody else are set out on the closing page, and the fee for your own matter is confirmed in writing before any work starts.

SEND IT BACK TO

aaron@safeharbour.legal

01262 310 850

safeharbour.legal

Answer section 01 and send it. That is enough for Aaron to open the file, confirm the fee and book the appointment. A blank is an answer: it tells him what to ask you about.

IF AN ADVISER SENT YOU THIS

No referral fee is paid or received in either direction.

Adviser name

Firm

Email

FCA or firm reference

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP

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01

Start here

NEEDED TO START
ABOUT 6 MIN

If you fill in nothing else, fill in this. It is enough for Aaron to open the file, confirm the fee and book the appointment.

DONOR 1

DONOR 2

Title and all first names, in full

In full, not initials, exactly as on your passport or driving licence

Surname

Date of birth

DD / MM / YYYY

Email

Phone

Address, with postcode

How would you like Aaron to reply?

☐ Email

☐ Phone

☐ Post

Which powers do you want? Answer for both of you.

☐ Both

☐ Property and financial affairs only

☐ Health and welfare only

☐ Not sure yet

Property and financial affairs is the one for money, bills, benefits and your home. Health and welfare is the one for care, treatment and where you live. They are two separate documents and you can make one without the other.

Who do you have in mind to act for you? Names and how they are related

Names only. Section 02 takes the detail, and who steps in if they cannot.

Do you receive means-tested benefits?

☐ Yes

☐ No

It changes what the Office of the Public Guardian charges to register.

Do you already have a power of attorney of any kind?

☐ Yes

☐ No

An enduring power, a lasting power, or one made abroad. Section 03 asks what kind.

Is there any reason this is urgent?

☐ Yes

☐ No

A diagnosis, an operation, a move into care, or a sale going through. Say what in section 06.

Anything that would make this easier

Someone else Aaron can contact if he cannot reach you, and their number

Anything that would make it easier to deal with Aaron

Hearing, sight, reading, a language, a time of day, or someone you would like with you.

That is section 01 finished

Your name

Signature

Date

DD / MM / YYYY

Send it now to aaron@safeharbour.legal if that is as far as you have got today. It is a complete thing to send. The rest of the form is what Aaron goes through with you, and you can send it later or bring it with you.

02

Who acts, and what happens if they cannot

ONLY IF IT APPLIES
ABOUT 8 MIN

The decisions that shape the power. Aaron goes through every one of them with you before anything is signed. Several questions in this pack have a line saying you would rather talk it through. Ticking more than one is normal and it is what the meeting is for.

Answer every tick-one question in this section separately for each of you. You do not have to give the same answer.

The same people can act under both powers, or you can name different people for money and for care. If they differ, say who is for which in the box under the schedule.

If you could not deal with your own money tomorrow, who should be able to do it?

DONOR 1 DONOR 2

☐
☐

My husband, wife or partner, on their own

They act alone from the day the power can first be used. Nobody else can give instructions to the bank or sign anything. If nobody is named in the group below marked IF ONE OF THEM CANNOT ACT, the power stops working when they can no longer act.

☐
☐

One person who is not my husband, wife or partner

Your husband, wife or partner has no authority under this power, whether or not they are able to act.

☐
☐

My husband, wife or partner, together with one or more other people named below

All of them are appointed and all of them act. How they act together is the next question.

☐
☐

Two or more people, none of them my husband, wife or partner

Everyone you name acts from the day the power can first be used. How they act together is the next question.

None of these. What I want is

☐
☐

I would rather go through this one with Aaron before I answer

Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

Who steps in if one of them cannot act is the schedule below, in the group marked IF ONE OF THEM CANNOT ACT. Nobody in the group marked FIRST is a stand-in.

The people you are naming

Anyone 18 or over whom you would trust with your bank card and your care. The forms hold four in the first group and two in the second. If you do not know a date of birth, write 'to check'.

	FULL NAME	DATE OF BIRTH	ADDRESS, WITH POSTCODE	HOW THEY ARE RELATED	PHONE OR EMAIL	WHO THEY WOULD STEP IN FOR	WHOSE POWER
FIRST	EG	David Hartley	02/11/58	8 Quay Road	son	07700 900456	
IF ONE OF THEM CANNOT ACT							

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

If different people should act for money and for care, who is for which

--

Leave it blank if the same people act under both powers.

When more than one person is acting at the same time, how should they take decisions between them?

- ☐ **Every one of them has to agree to every decision**
One of them on their own can sign nothing, and a bank will not deal with one of them without the others. If any one of them dies or can no longer act, the whole appointment ends and the people at the next step take over. If there is nobody at the next step, the power stops working.
- ☐ **They must all agree on the things I list below, and any one of them can decide the rest**
The things you list need all of them. Everything else needs only one of them. If one of them can no longer act, the decisions you have listed cannot be taken by the others, and the list has to be worded exactly or the power is sent back.
- ☐ **Any one of them can decide on their own**
Any one of them can act without asking the others and without telling them.
- ☐ **I would rather go through this one with Aaron before I answer**
Nothing is drafted from this question until you have. It is at the top of the list for the meeting.

If you ticked the second, which decisions must they all agree on?

--

List them. Aaron puts them in the words the forms need.

If one of the people in the first group cannot act, who steps in?

- ☐ **The same people step in, whoever it is that cannot act**
If you said any one of them can decide on their own, the replacements step in alongside whoever is left. If you said every one of them has to agree, then when any one of them stops, all of them stop and the replacements take over from all of them.
- ☐ **I want a named person to take a named person's place, and I have put it in the last column above**
Aaron will tell you whether that can be put in the deed or has to be handled another way.
- ☐ **I would rather go through this one with Aaron before I answer**
Nothing is drafted from this question until you have.

Suppose one of the people you have named dies, falls ill themselves, or says they cannot do it any more. What should happen then?

- ☐ **It all stops, and the people at the next step take over instead**
Nobody from the first group goes on acting, even if they are able and willing to.
- ☐ **The ones who are left carry on without them**
Whoever is still able to act goes on acting.
- ☐ **I would rather go through this one with Aaron before I answer**
Nothing is drafted from this question until you have.

This covers some of the same ground as an earlier question, on purpose. If your two answers do not sit together, that is useful to Aaron and not a mistake.

If you have named your husband, wife or civil partner and the marriage or civil partnership later ended, should they carry on acting? ☐ Yes ☐ No

Answer it now, whichever way. Aaron drafts from your answer, and a blank is raised at the meeting.

Have you asked everyone you have named whether they are willing? ☐ Yes ☐ No

03 The rest of your details

ONLY IF IT APPLIES
ABOUT 3 MIN

The details the forms ask for, and the two questions Aaron has to put to everybody.

Any former names

Can you sign your own name? ☐ Yes ☐ No

If not, it changes who has to be in the room when you sign.

Is there any concern about your own ability to make decisions today? ☐ Yes ☐ No

Aaron has to ask this of everyone, and he will talk it through with you rather than decide it from a form.

Is anyone putting pressure on you to make this power? ☐ Yes ☐ No

Aaron asks this of everyone, and will see you on your own to ask it again.

If you already have one, what kind, who it names, and is it registered?

If you receive a means-tested benefit, which one, and the date of the letter

An enduring power, a lasting power, or one made abroad. Say whether you want it replaced or kept alongside the new one.

If there is a concern about capacity or about pressure, what it is

04

When it can be used, and treatment decisions

Two choices the forms make you take. Both are yours alone.

ONLY IF IT APPLIES
ABOUT 3 MIN

When can the money attorneys start acting?

DONOR 1 DONOR 2

☐
☐

Only once I cannot make the decision myself

Nobody can use it while you can still make the decision yourself, even if you would like them to, and whoever they deal with can ask for evidence that you cannot before they act on it.

☐
☐

As soon as it is registered, with my agreement

Your attorneys can act while you can still decide for yourself, for example if you are in hospital or abroad. They can also act without asking you first.

☐
☐

I would rather go through this one with Aaron before I answer

Nothing is drafted from this question until you have.

Life-sustaining treatment: who decides?

DONOR 1 DONOR 2

☐
☐

The doctors decide

Your attorneys have no say in treatment that keeps you alive. They decide everything else about your care and treatment.

☐
☐

My attorneys decide

Your attorneys can agree to, or refuse, treatment that keeps you alive, on your behalf, and the doctors follow their decision.

☐
☐

I would rather go through this one with Aaron before I answer

Nothing is drafted from this question until you have.

Health and welfare only. It has to be answered before the power can be made, and Aaron goes through it with you.

Do you have an advance decision to refuse treatment?

☐ Yes

☐ No

Sometimes called a living will. Bring it, and Aaron reads it alongside the power.

05

What you want your attorneys to do

Guidance for the people who will act for you. Aaron does the wording.

ONLY IF IT APPLIES
ABOUT 4 MIN

There are two kinds of thing you can put in. A preference is something you would like your attorneys to think about. An instruction is something they have to do. Write both here in your own words and Aaron will tell you which is which and word it so the power still works.

Money: what you would want, and what you would not want

For example: keep paying to the same charities, keep my house as long as possible, keep my accounts with the same bank.

Care and welfare: what you would want, and what you would not want

For example: I would rather be cared for at home, I am vegetarian, I want to keep my dog, do not move me away from Bridlington.

Anyone you want told when the power is registered

Anyone named here is told when the power is sent to be registered, so they can raise a concern if they have one. You do not have to name anybody. The forms hold four.

FULL NAME	ADDRESS, WITH POSTCODE	RELATIONSHIP

More than this? There is a continuation sheet at the back, headed C. Write the section number beside each line.

06

The certificate provider, and anything else

One independent person confirms that you understand what you are signing.

ONLY IF IT APPLIES
ABOUT 2 MIN

Would you like Aaron to do it? Tick the first box and go to the close.

Would you like Aaron to be your certificate provider?

☐ Yes ☐ No

He can, at no extra cost, as part of preparing the power.

If not, their full name

Their phone or email

Their job, if that is how they know you

Their address, with postcode

How do they know you?

☐ They have known me personally for two years or more

☐ They have the professional skill to judge it

Are they related to you, to any attorney, or to any replacement, or do they work for one of them?

☐ Yes ☐ No

If yes, Aaron will say whether someone else has to do it.

Registering it

Who will send the forms to the Office of the Public Guardian?

☐ Aaron, as part of the work ☐ Me ☐ One of my attorneys

Who will pay the registration fee, if not you

It is paid to the Office of the Public Guardian, not to Safe Harbour. If an attorney pays it, say which.

Would you like a certified copy for each attorney, and how many

A number. Aaron says what a copy costs before it is made.

Anything else Aaron should know

Including anything above that would not fit, anything the two of you want done differently, why it is urgent if it is, and anything you are worried about.

07

Before you send it

What happens to your answers, what to bring, and where to sign.

NEEDED TO START
ABOUT 2 MIN

What Aaron will need to see, at or before the appointment

- ☐ Photo ID for each of you
- ☐ Something with your address on it, dated in the last three months
- ☐ Any power of attorney you already have
- ☐ Any advance decision to refuse treatment
- ☐ Full names and addresses for your attorneys
- ☐ Proof of benefits, if you are claiming a reduced registration fee

Tick what you already have. Nothing has to be sent with this form, and nothing missing here delays the work.

What the fee covers

Taken from the schedule on page one. The fee for your own matter is confirmed in writing before any work starts.

WHAT THE FEE COVERS

All four documents, drafted, signed and registered together.

PAID TO SOMEBODY ELSE

Office of the Public Guardian registration fee, £92.

Two things to agree

- ☐ Tell the adviser named on page one when the matter opens, with the agreed fee, and again when it is signed.
- ☐ Ordinary email is fine for documents about my matter, and I have read the warning about money below.

Where the originals go

Where you would like the signed originals kept

With Aaron, with you, or somewhere else.

Who else should know where they are

A name and a phone number is enough.

Did anyone help you fill this in, and which parts?

Their name and how they are related to you. Write none if you did it yourself.

Signed

Type your name, or print this page and sign it by hand.

Donor 1, full name

Signature

Date

DD / MM / YYYY

Donor 2, full name

Signature

Date

DD / MM / YYYY

Your information

MDLS Solicitors Limited is the controller for the information on this form. It is used to advise you and to carry out your instructions, and is kept as long as the file and the professional record require. It is not sold, and it is not shared outside the firm without your consent except where the law requires it. The data protection officer is Matthew Dowell, md@legalstudio.co.uk. The firm is registered with the Information Commissioner under ZA057790, and you can complain to the Commissioner at ico.org.uk.

If something goes wrong

If something goes wrong, say so. Tell Aaron first, on 01262 310 850 or at aaron@safeharbour.legal. If that does not settle it, write to Ian McCann, Solicitor and Chief Executive, at ijm@legalstudio.co.uk or on 0113 247 3800. You will have an acknowledgement within five working days and an answer within eight weeks. After that, or if eight weeks pass, you can take the complaint to the Legal Ombudsman at enquiries@legalombudsman.org.uk, on 0300 555 0333, or at PO Box 6167, Slough, SL1 0EH, within six months of the firm's final answer and within one year of the problem. The Solicitors Regulation Authority deals separately with conduct, at sra.org.uk.

Money

Safe Harbour's bank details do not change during a matter, and Aaron will never email to say they have. If you get any message asking you to send money somewhere new, telephone 01262 310 850 before you send anything.



ONLY IF IT APPLIES

Your name

Date _____

DD / MM / YYYY

SECTION AND LIST

YOUR ANSWER, IN THE SAME ORDER AS THAT LIST'S COLUMNS

EG 05 Pensions

Aviva, old works pension, about 12,000, my wife

[illegible]

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP · 01262 310 850 · aaron@safeharbour.legal

A

At the meeting

FOR THE FIRM

Completed by Aaron, not by the client.

Instructions and what was said, in the client's own words, with their reasons

The note that answers, years later, what was said and what was understood.

Date	From and to	Where	Everyone present

DD / MM / YYYY

Office, home, telephone, video

Client seen on their own for part of the meeting	☐ Yes	☐ No
Instructions given by the client, not through anyone who benefits	☐ Yes	☐ No
Identity verified, evidence on the file	☐ Yes	☐ No
Conflict check run and clear	☐ Yes	☐ No
Source of funds and of wealth understood and recorded where relevant	☐ Yes	☐ No
Client care letter and terms of business sent	☐ Yes	☐ No

ID: what was seen. Type and expiry only, no numbers on this sheet	How checked	File reference

Original, certified copy, electronic

Understood, in their own words. What was observed, not a conclusion

☐ What they were making, and its effect	☐ What they owned, broadly
☐ Who might expect to benefit	☐ No disorder affecting the decision
☐ Medical opinion sought	☐ Not needed, reason in the note above

Scope	Fee agreed, plus VAT	Matter reference	Signed and dated

WHAT HAPPENS NEXT	WHO	BY WHEN

B

For the adviser who sent this

NOT PART OF THE FORM

For the financial adviser, accountant or broker who passed this on. Nothing on this page is part of the form.

What happens to a referral

Aaron reads the form before he meets the client, confirms the fee in writing, and does the work. No referral fee is paid or received in either direction, and the client is charged the same as anyone else. If the client has ticked the box on page one, you are told twice: when the matter opens, with the agreed fee and the expected date, and again when the documents are signed. Nothing else is sent to you, and your own details are used for those two messages and nothing else. They are not added to any list and are not passed on.

What Safe Harbour does not do

- 01 No investment advice, no products, no commission, and no financial promotions.
- 02 No approach to your client about anything you have not asked for.
- 03 No fee for the referral, in either direction.
- 04 Nothing signed without Aaron speaking to the client, on their own for part of it.

Data protection, when you forward a form

If your client returns the form themselves, MDLS Solicitors Limited is the controller from the moment it arrives and you never hold their answers. If you forward a completed form, you are processing your own client's information under your own registration and Aaron becomes a separate controller when he receives it. The cleaner route is to send the blank form and let the client return it.

Getting hold of Aaron

Aaron Johnson, Solicitor of the Senior Courts of England and Wales, TEP. Telephone 01262 310 850, or aaron@safeharbour.legal. Regulated through Legal Studio, with the professional indemnity insurance and the complaints route that brings; the complaints route is printed in full on the client's own closing page. Check the register at sra.org.uk under SRA ID 598793.



Flamborough Head lighthouse
Drawn from a photograph by Nick Mutton, CC BY-SA 2.0