

COMMONWEALTH OF PENNSYLVANIA

## DURABLE GENERAL POWER OF ATTORNEY

Pursuant to 20 Pa.C.S. Chapter 56

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### NOTICE

THE PURPOSE OF THIS POWER OF ATTORNEY IS TO GIVE THE PERSON YOU DESIGNATE (YOUR "AGENT") BROAD POWERS TO HANDLE YOUR PROPERTY, WHICH MAY INCLUDE POWERS TO PLEDGE, SELL, OR OTHERWISE DISPOSE OF ANY REAL OR PERSONAL PROPERTY WITHOUT ADVANCE NOTICE TO YOU OR APPROVAL BY YOU. THIS POWER OF ATTORNEY DOES NOT IMPOSE A DUTY ON YOUR AGENT TO EXERCISE GRANTED POWERS, BUT WHEN POWERS ARE EXERCISED, YOUR AGENT MUST USE DUE CARE TO ACT FOR YOUR BENEFIT AND IN ACCORDANCE WITH THIS POWER OF ATTORNEY.

YOUR AGENT MAY EXERCISE THE POWERS GIVEN HERE THROUGHOUT YOUR LIFETIME, EVEN AFTER YOU BECOME INCAPACITATED, UNLESS YOU EXPRESSLY LIMIT THE DURATION OF THESE POWERS OR YOU REVOKE THESE POWERS OR A COURT ACTING ON YOUR BEHALF TERMINATES OR MODIFIES YOUR AGENT'S AUTHORITY.

YOUR AGENT MUST ACT IN ACCORDANCE WITH YOUR REASONABLE EXPECTATIONS TO THE EXTENT ACTUALLY KNOWN BY YOUR AGENT AND, OTHERWISE, IN YOUR BEST INTEREST, ACT IN GOOD FAITH AND ACT ONLY WITHIN THE SCOPE OF AUTHORITY GRANTED BY YOU IN THIS POWER OF ATTORNEY.

THE POWERS AND DUTIES OF AN AGENT UNDER A POWER OF ATTORNEY ARE EXPLAINED MORE FULLY IN 20 Pa.C.S. Ch. 56. IF THERE IS ANYTHING ABOUT THIS FORM THAT YOU DO NOT UNDERSTAND, YOU SHOULD ASK A LAWYER OF YOUR OWN CHOOSING TO EXPLAIN IT TO YOU.

I HAVE READ OR HAD EXPLAINED TO ME THIS NOTICE AND I UNDERSTAND ITS CONTENTS.

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Date: March 15, 2025

Margaret A. Whitfield (Principal)

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### ARTICLE I: DESIGNATION OF PRINCIPAL AND AGENT

I, **Margaret A. Whitfield**, of 742 Elmhurst Drive, Apt. 3B, Philadelphia, Pennsylvania 19103, born on June 14, 1958, Social Security Number ending in XXX-XX-4728, being of sound mind and under no constraint or undue influence, do hereby appoint the following individual as my Attorney-in-Fact (hereinafter referred to as my "Agent"):

**Primary Agent:** Robert J. Whitfield (Son)  
Address: 1584 Oakmont Boulevard, Pittsburgh, Pennsylvania 15213  
Telephone: (412) 555-0193  
Email: rjwhitfield@email.example.com

**Successor Agent:** In the event that my Primary Agent is unable or unwilling to serve or continue to serve, I designate the following individual as my Successor Agent:

Patricia L. Donovan (Daughter)  
Address: 239 Cherry Lane, Harrisburg, Pennsylvania 17101  
Telephone: (717) 555-0847

### ARTICLE II: DURABILITY PROVISION

Pursuant to 20 Pa.C.S. Section 5604, this Power of Attorney is DURABLE and shall not be affected by my subsequent disability, incapacity, or incompetence. It shall remain in full force and effect until my

death or until I revoke it in writing, or until a court of competent jurisdiction modifies or terminates the authority granted herein. This Power of Attorney shall be effective immediately upon execution.

### **ARTICLE III: POWERS GRANTED**

I grant my Agent general authority to act for me with respect to the following subjects as defined in 20 Pa.C.S. Section 5602:

- (A) Real Property Transactions.** To buy, sell, lease, exchange, mortgage, grant options, collect rent, and in all ways manage my real property, including but not limited to any residential property located at 742 Elmhurst Drive, Philadelphia, PA 19103.
- (B) Tangible Personal Property Transactions.** To buy, sell, lease, exchange, and otherwise manage my tangible personal property, including vehicles, furniture, equipment, and personal effects.
- (C) Stock, Bond, and Securities Transactions.** To buy, sell, exchange, and manage stocks, bonds, mutual funds, and other securities held in any brokerage or investment account in my name.
- (D) Banking and Financial Institution Transactions.** To conduct any and all banking transactions, including opening and closing accounts, making deposits and withdrawals, writing checks, accessing safe deposit boxes, and obtaining loans or lines of credit on my behalf.
- (E) Insurance and Annuity Transactions.** To purchase, modify, surrender, collect benefits from, and make claims under any insurance policies or annuity contracts, whether life, health, disability, casualty, or other type.
- (F) Retirement Plan Transactions.** To contribute to, withdraw from, change beneficiary designations on, and manage all retirement plans, pensions, IRAs, 401(k) plans, and similar accounts.
- (G) Tax Matters.** To prepare, sign, file, and amend federal, state, and local tax returns; receive confidential tax information; contest tax assessments; and claim refunds on my behalf.
- (H) Government Benefits.** To apply for, manage, and maintain eligibility for all government benefits, including Social Security, Medicare, Medicaid, Veterans Affairs benefits, and any other federal, state, or local programs.
- (I) Legal Actions and Proceedings.** To initiate, defend, settle, or otherwise participate in legal, administrative, or arbitration proceedings on my behalf, and to retain legal counsel as necessary.
- (J) Personal and Family Maintenance.** To pay for my personal care, support, maintenance, and the maintenance of my dependents from my assets.

### **ARTICLE IV: SPECIAL INSTRUCTIONS AND LIMITATIONS**

The following special instructions and limitations shall apply to the authority granted under this Power of Attorney:

- (1) My Agent shall not have the authority to make gifts of my property exceeding \$5,000 per recipient per calendar year, subject to the limitations of 20 Pa.C.S. Section 5601.2.
- (2) My Agent shall not have the authority to change any beneficiary designation on any of my life insurance policies or retirement accounts, except to name my grandchildren as contingent beneficiaries.
- (3) My Agent shall maintain detailed records of all transactions conducted on my behalf and shall provide an accounting to my Successor Agent or to any court of competent jurisdiction upon request.

(4) Under no circumstances shall my Agent use my assets for the personal benefit of the Agent, except as reasonable compensation for services rendered in the administration of this Power of Attorney, not to exceed \$500 per month.

## **ARTICLE V: THIRD-PARTY RELIANCE**

Any third party who receives a copy of this Power of Attorney may rely upon it. Revocation of this Power of Attorney is not effective as to a third party until the third party has actual knowledge of the revocation. I agree to indemnify and hold harmless any third party who acts in good faith reliance upon the authority granted in this Power of Attorney.

## **ARTICLE VI: GUARDIAN NOMINATION**

If a court decides that it is necessary to appoint a guardian of my estate or guardian of my person, I hereby nominate my Agent, Robert J. Whitfield, to serve in that capacity. If Robert J. Whitfield is unable or unwilling to serve, I nominate Patricia L. Donovan as an alternative guardian.

## **ARTICLE VII: REVOCATION**

I reserve the right to revoke this Power of Attorney at any time by providing written notice to my Agent and to any third parties who may have received a copy of this document. Upon revocation, all authority granted herein shall immediately cease, subject to the protections afforded to third parties under 20 Pa.C.S. Section 5608.

## **EXECUTION**

IN WITNESS WHEREOF, I have hereunto set my hand this 15th day of March, 2025.

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Margaret A. Whitfield

*Principal*

Date: March 15, 2025

## **WITNESSES**

The foregoing instrument was signed, sealed, and declared by the above-named Principal as her Power of Attorney, in our presence, and we, at her request and in her presence and in the presence of each other, have subscribed our names as witnesses thereto.

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Jennifer M. Kowalski

*Witness #1 - 891 Pine Street, Philadelphia, PA 19107*

Date: March 15, 2025

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David R. Thompson

*Witness #2 - 4520 Walnut Street, Philadelphia, PA 19139*

Date: March 15, 2025

## **NOTARY ACKNOWLEDGMENT**

COMMONWEALTH OF PENNSYLVANIA

COUNTY OF PHILADELPHIA

On this 15th day of March, 2025, before me, a Notary Public, personally appeared Margaret A. Whitfield, known to me (or satisfactorily proven) to be the person whose name is subscribed to the within instrument, and acknowledged that she executed the same for the purposes therein contained.

IN WITNESS WHEREOF, I have hereunto set my hand and notarial seal.

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Anna C. Rodriguez

*Notary Public My Commission Expires: December 31, 2027 Notary ID: 2019-PA-041582*

Date: March 15, 2025

## **AGENT'S ACKNOWLEDGMENT**

*Pursuant to 20 Pa.C.S. Section 5601(d)*

I, Robert J. Whitfield, have read the Power of Attorney dated March 15, 2025, and am the person identified as the Agent for the Principal, Margaret A. Whitfield. I hereby acknowledge that when I act as Agent:

I shall act in accordance with the Principal's reasonable expectations to the extent actually known by me and, otherwise, in the Principal's best interest, act in good faith and act only within the scope of authority granted to me by the Principal in the Power of Attorney.

I shall not act in any manner that is contrary to the Principal's known wishes or in any manner that would constitute self-dealing, unless specifically authorized by the Principal in the Power of Attorney document.

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Robert J. Whitfield

*Agent*

Date: March 15, 2025

*DISCLAIMER: This document is a sample generated for demonstration and testing purposes only. It is NOT a valid legal document and should NOT be used for any legal purpose. All names, addresses, and identifying information are fictional.*