

STEP GLOBAL REPRESENTATIVE POWER FOR PROPERTY AND FINANCIAL AFFAIRS

MODEL APPLICATION FORM

1. GRANTOR

Guidance for authority

This section to include:

- Grantor’s personal information.
- Revocation of previous lasting/enduring power of attorney (LPA/EPA); if applicable.
- Other declarations.

Grantor details:

Title: _____

First name: _____

Last name: _____

Date of birth: _____

Address: _____

Email address: _____

(Optional)

I intend to revoke my previously existing LPA/EPA

Signature:

Other declarations, if any:

Signature:

2. GRANTOR'S REPRESENTATIVE/S

Guidance for authority

This section to include:

- Representative/s personal information.
- Decisions the representative/s can make (if applicable):
 - Financial- and property-related decisions such as managing bank accounts, paying bills and selling the grantor's property.
 - Limited/specified matters – the grantor has the right to specify the limits and the scope of what decisions the representative may make.
- Substitute/alternate representative/s (in the event that the primary representative/s is otherwise unwilling or unable to act).¹
- Substitute representative/s cannot appoint another representative of their own accord, only a centralised authority² can.

Representative's details:

Title: _____

First name: _____

Last name: _____

Date of birth: _____

Address: _____

Email address: _____

(Optional)

Please indicate which decisions your representative may make:

ENTER TEXT HERE

¹ Substitute representatives can step in and/or succeed any of the primary representatives deemed incompetent, unwilling or who have died.

² The domestic authority responsible for registering the GRP and supervising representatives.

Please state any specific instructions for the representative relating to the limits and the scope of what decisions they may make:

ENTER TEXT HERE

Substitute representative/s details (substitute representative/s can step in and/or succeed any of the primary representatives deemed incompetent, unwilling or who have died):

Substitute representative #1

Title: _____
First name: _____
Last name: _____
Date of birth: _____
Address: _____

Substitute representative #2

Title: _____
First name: _____
Last name: _____
Date of birth: _____
Address: _____

3. DECISION MAKING AND POWERS (IF MORE THAN ONE PRIMARY REPRESENTATIVE IS APPOINTED)

Guidance for authority

If different representatives are appointed for different matters, the grantor should specify how they wish representatives to act and for which matters they are responsible.

- Jointly: make decisions together; all must agree.

Or

- Jointly and severally: either individually, collectively or a combination that can be described in the text box below).³

Please specify how you want decisions to be made:

Jointly: make decisions together; all must agree

Or

Jointly and severally: either individually, collectively or a combination that can be described in the text box below.

Please specify the distribution of power and matters among your representatives:

ENTER TEXT HERE

³ Some jurisdictions may allow 'majority' decisions; i.e., if the majority of appointed representatives agree on a decision, action is taken.

4. GRP START DATE

Guidance for authority

This section to include whether the GRP will become active:

- At the same time for all matters:
 - Immediately upon making the GRP.
 - When the grantor ceases to have decision-making capacity.

Or,

- At different times for different matters (provide detail).

Please specify when the GRP will become active:

This GRP will become active from the time the document is signed.⁴

Or

This GRP will become active in the event of my incapacity.

Or

This GRP will become active at different times for different matters (please provide detail below)

If you want the GRP to become active at different times for different matters, please provide detail:

ENTER TEXT HERE

⁴ Certification may also be necessary in some jurisdictions before the GRP can be used.

5. SPECIFIC INSTRUCTIONS FOR THE REPRESENTATIVE

Guidance for authority

This section is optional.

The representative is required to consider any conditions and/or instructions, such as:

- **Conflict transactions:** the conflict between the duty of the grantor’s representative to the grantor and an interest of their own/a relative/business associate or close friend. A grantor can authorise their representative to enter into transactions even if there is a conflict of interest.
- **Gifts:** a representative for financial matters can use the grantor’s money or other financial assets to make a gift/donation. Gifts can be made on customary occasions in customary amounts. Any additional gifts/donations must be reasonable in the circumstances, particularly having regard to the grantor’s financial situation. There can be a further specification of any conditions/restrictions that the grantor may want to place on the making of gifts/donations.
- **Maintenance of dependants:** instructions to the grantor’s representative to use their money or other financial assets to provide for the needs of one or more of the grantor’s dependants. The amount made available by the representative to maintain those dependants must not be more than what is reasonable, having regard to the grantor’s circumstances. The grantor must have sufficient assets remaining after the provision to their dependants to maintain them during their life.
- **Any other.**

If you (the grantor) have specific instructions for the representative in regards to your financial affairs, please specify below (use words such as ‘must’):

ENTER TEXT HERE

If you (the grantor) have views or wishes you would like your representative to have regard to when making decisions about your financial affairs, please specify below (use words such as ‘prefer’):

ENTER TEXT HERE

6. NOTIFYING: DETAILS OF PERSONS TO BE NOTIFIED⁵

Please provide the details of anyone ('Relevant Persons') you wish to notify when your GRP is active (this is optional):

Relevant Person #1

Title: _____
First name: _____
Last name: _____
Date of birth: _____
Address: _____

Relevant Person #2

Title: _____
First name: _____
Last name: _____
Date of birth: _____
Address: _____

Relevant Person #3

Title: _____
First name: _____
Last name: _____
Date of birth: _____
Address: _____

Only valid with official stamp here:

⁵ Some jurisdictions may require notification on both creation and registration of the GRP. Please refer to the laws and guidance in your local jurisdiction (for example: notifications in Ireland are time-sensitive).

6.1 GRANTOR'S SIGNATURE (WITH WITNESS STATEMENTS)

By signing on this page I confirm:

- I have read the Global Representative Power (GRP) Guiding Principles document and 'Making a GRP – Application form guidance' document, or I have had them read to me.
- I appoint and give my representative/s authority to make decisions about my property and financial affairs on my behalf, subject to the terms of this GRP and the definition stated in the Guiding Principles document.
- I acknowledge the information I have provided may be used by a centralised authority in carrying out its duties, if there is one.

Grantor

Signed (or marked) by the person giving this Global Representative Power and delivered:⁶

Title: _____

First name: _____

Last name: _____

Address: _____

Signature: _____

Date signed/marked: _____

Continued overleaf

⁶ In some jurisdictions a GRP must take the form of a deed.

Witnesses

We certify that the grantor signed this GRP in our presence:

Witness #1

The witness must not be a representative or substitute representative appointed under this GRP (or a relative of the representatives) and must be at least 18-years-old.⁷

Full name: _____
Address: _____

Signature: _____
Date signed/marked: _____

Witness #2 (optional)

The witness must not be a representative or substitute representative appointed under this GRP (or a relative of the representatives) and must be at least 18-years-old.⁸

Full name: _____
Address: _____

Signature: _____
Date signed/marked: _____

Witness #3 (optional)

The witness must not be a representative or substitute representative appointed under this GRP (or a relative of the representatives) and must be at least 18-years-old.⁶

Full name: _____
Address: _____

Signature: _____
Date signed/marked: _____

Only valid with official stamp here:

⁷ Or of the legal age of majority as defined by the relevant jurisdiction.

⁸ Or of the legal age of majority as defined by the relevant jurisdiction.

6.2 CERTIFICATE PROVIDER (if required)

Guidance for authority

Some jurisdictions may require the 'certificate provider' to confirm they've discussed the Global Representative Power (GRP) with the grantor, that the grantor understands what they're doing and that nobody is forcing them to sign the GRP.

Requirements – the 'certificate provider' must be:

- Someone with relevant professional skills, such as the adult's GP, a healthcare professional, psychiatrist, solicitor or other person authorised in your jurisdiction.

Restrictions – the certificate provider must not be:

- A representative or substitute representative named in this GRP or any other enduring power of representation for the adult.
- A member of the grantor's family or the representative/s' family; including husbands, wives, civil partners, in-laws and step-relatives.
- An unmarried partner, boyfriend or girlfriend of either the grantor or the representative/s (whether or not they live at the same address).
- The grantor's or representative's business partner.
- The grantor's or representative's employee.
- An owner, manager, director or employee of a care home where the grantor lives.

Continued overleaf

Certificate provider’s statement:

I certify that, to my knowledge, at the time of signing the form:

- the grantor understood the purpose of this GRP and the scope of the authority conferred under it,
- no fraud or undue influence/pressure is being used to induce the grantor to create this GRP, and
- there is nothing else which would prevent this GRP from being created by the completion of this instrument.

By signing this section, I confirm that:

- I am at least 18-years-old,⁹
- I have read this GRP and all its supporting documents and information,
- there is no restriction on my acting as a certificate provider, and
- the grantor has chosen me as a person with relevant professional skills and expertise.

Title: _____

First name: _____

Last name: _____

Address: _____

Signature: _____

Date signed/marked: _____

Only valid with official stamp here:

⁹ Or of the legal age of majority as defined by the relevant jurisdiction.

6.3 REPRESENTATIVE/S

By signing this section, I understand and confirm all of the following:

- I am at least 18-years-old.¹⁰
- I have read this Global Representative Power (GRP).
- I undertake to act in accordance with my obligations and duties as a representative and understand the consequences of failing to do so.
- I must make decisions and act as per the rights, will and preferences of the grantor and act in accordance with the law that applies to me as the representative.
- I must take into account any instructions or preferences set out in this GRP.

Further statement by a substitute representative:

I understand that I have the authority to act under this GRP only after the primary representative has been deemed incompetent or is unable/unwilling to act.

Representative #1 (Primary)

Title: _____
First name: _____
Last name: _____
Address: _____

Signature: _____
Date signed/marked: _____

Representative #2 (optional)

Title: _____
First name: _____
Last name: _____
Address: _____

Role: _____
(additional primary representative, or substitute to primary)
Signature: _____
Date signed/marked: _____

Representative #3 (optional)

Title: _____
First name: _____
Last name: _____
Address: _____

Role: _____
(additional primary representative, or substitute to primary/representative #2)
Signature: _____
Date signed/marked: _____

Only valid with official stamp here:

¹⁰ Or of the legal age of majority as defined by the relevant jurisdiction.

ABOUT **STEP**

STEP is a global professional body, comprising lawyers, accountants, trustees and other practitioners that help families plan for their futures.

Our mission is to inspire confidence in families planning their assets across generations by setting and upholding high professional standards, informing public policy, promoting education, and connecting practitioners globally to share knowledge and best practice.

Full STEP members, known as TEPs, are internationally recognised as experts in their field, with proven qualifications and experience.

STEP Global Representative Power

This document forms part of the STEP Global Representative Power toolkit, which comprises:

- *Guiding Principles*
- *Model Application Form*
- *Making a GRP – Application Form Guidance*
- *Registered GRP Template Certificate*

The full toolkit can be found at www.step.org/grp

STEP
Artillery House,
11-19 Artillery Row,
London, SW1P 1RT,
United Kingdom

Telephone: [+44 \(0\) 203 752 3700](tel:+442037523700)
Email: step@step.org

A company limited by guarantee and incorporated in England and Wales under the *Companies Act 1985*. Registered number 2632423.
Registered Office: Artillery House, 11-19 Artillery Row, London, SW1P 1RT United Kingdom

© **STEP 2023**