

Effective 9/1/2024

**Part 1
General Provisions**

75A-2-101 Reserved.

Reserved.

Enacted by Chapter 364, 2024 General Session

75A-2-102 Definitions for chapter.

As used in this chapter:

- (1)
 - (a) "Agent" means a person granted authority to act for a principal under a power of attorney, whether denominated an agent, attorney-in-fact, or otherwise.
 - (b) "Agent" includes an original agent, coagent, successor agent, and person to which an agent's authority is delegated.
- (2) "Beneficiary" means the same as that term is defined in Section 75-1-201.
- (3) "Beneficiary designation" means the same as that term is defined in Section 75-1-201.
- (4) "Child" means the same as that term is defined in Section 75-1-201.
- (5) "Claims" means the same as that term is defined in Section 75-1-201.
- (6) "Conservator" means the same as that term is defined in Section 75-1-201.
- (7) "Descendant" means the same as that term is defined in Section 75-1-201.
- (8) "Durable," with respect to a power of attorney, means not terminated by the principal's incapacity.
- (9) "Electronic" means relating to technology having electrical, digital, magnetic, wireless, optical, electromagnetic, or similar capabilities.
- (10) "Estate" means the same as that term is defined in Section 75-1-201.
- (11) "Fiduciary" means the same as that term is defined in Section 75-1-201.
- (12) "Good faith" means honesty in fact.
- (13) "Guardian" means the same as that term is defined in Section 75-1-201.
- (14) "Incapacity" means the inability of an individual to manage property or business affairs because the individual:
 - (a) has an impairment in the ability to receive and evaluate information or make or communicate decisions even with the use of technological assistance; or
 - (b) is:
 - (i) missing;
 - (ii) detained, including incarcerated in a penal system; or
 - (iii) outside the United States and unable to return.
- (15) "Lease" means the same as that term is defined in Section 75-1-201.
- (16) "Mortgage" means the same as that term is defined in Section 75-1-201.
- (17) "Organization" means the same as that term is defined in Section 75-1-201.
- (18) "Person" means an individual, corporation, business trust, estate, trust, partnership, limited liability company, association, joint venture, public corporation, government or governmental subdivision, agency, or instrumentality, or any other legal or commercial entity.
- (19) "Personal representative" means the same as that term is defined in Section 75-1-201.
- (20) "Power of attorney" means a writing or other record that grants authority to an agent to act in the place of the principal, whether or not the term power of attorney is used.

(21)

- (a) "Presently exercisable general power of appointment," with respect to property or a property interest subject to a power of appointment, means power exercisable at the time in question to vest absolute ownership in the principal individually, the principal's estate, the principal's creditors, or the creditors of the principal's estate.
- (b) "Presently exercisable general power of appointment" includes a power of appointment not exercisable until the occurrence of a specified event, the satisfaction of an ascertainable standard, or the passage of a specified period only after the occurrence of the specified event, the satisfaction of the ascertainable standard, or the passage of the specified period.
- (c) "Presently exercisable general power of appointment" does not include a power exercisable in a fiduciary capacity or only by will.

(22) "Principal" means an individual who grants authority to an agent in a power of attorney.

(23) "Property" means anything that may be the subject of ownership, whether real or personal, or legal or equitable, or any interest or right therein.

(24) "Record" means information that is inscribed on a tangible medium or that is stored in an electronic or other medium and is retrievable in perceivable form.

(25) "Security" means the same as that term is defined in Section 75-1-201.

(26) "Sign" means, with present intent to authenticate or adopt a record:

- (a) to execute or adopt a tangible symbol; or
- (b) to attach to or logically associate with the record an electronic sound, symbol, or process.

(27) "State" means a state of the United States, the District of Columbia, Puerto Rico, the United States Virgin Islands, or any territory or insular possession subject to the jurisdiction of the United States.

(28)

(a) "Stocks and bonds" means stocks, bonds, mutual funds, and all other types of securities and financial instruments, whether held directly, indirectly, or in any other manner.

(b) "Stocks and bonds" does not include commodity futures contracts and call or put options on stocks or stock indexes.

(29) "Trust" means the same as that term is defined in Section 75-1-201.

(30) "Trustee" means the same as that term is defined in Section 75-1-201.

(31) "Will" means the same as that term is defined in Section 75-1-201.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-103 Applicability.

This chapter applies to all powers of attorney except:

- (1) a power to the extent it is coupled with an interest in the subject of the power, including a power given to or for the benefit of a creditor in connection with a credit transaction;
- (2) a power to make health care decisions;
- (3) a proxy or other delegation to exercise voting rights or management rights with respect to an entity; and
- (4) a power created on a form prescribed by a government or governmental subdivision, agency, or instrumentality for a governmental purpose.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-104 Power of attorney is durable.

A power of attorney created under this chapter is durable unless it expressly provides that it is terminated by the incapacity of the principal.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-105 Execution of power of attorney.

- (1)
 - (a) A power of attorney shall be signed by the principal or in the principal's conscious presence by another individual directed by the principal to sign the principal's name on the power of attorney before a notary public or other individual authorized by the law to take acknowledgments.
 - (b) A signature on a power of attorney is presumed to be genuine if the principal acknowledges the signature before a notary public or other individual authorized by law to take acknowledgments.
- (2) If the principal resides or is about to reside in a hospital, assisted living, skilled nursing, or similar facility, at the time of execution of the power of attorney, the principal may not name any agent that is the owner, operator, health care provider, or employee of the hospital, assisted living facility, skilled nursing, or similar residential care facility unless:
 - (a) the agent is the spouse, legal guardian, or next of kin of the principal; or
 - (b) the agent's authority is strictly limited to the purpose of assisting the principal to establish eligibility for Medicaid.
- (3) A violation of Subsection (2) is a violation of Section 76-5-111.4.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-106 Validity of power of attorney.

- (1) A power of attorney executed in this state on or after May 10, 2016, is valid if its execution complies with Section 75A-2-105.
- (2) A power of attorney executed in this state before May 10, 2016, is valid if its execution complied with the law of this state as it existed at the time of execution.
- (3) A power of attorney executed other than in this state is valid in this state if, when the power of attorney was executed, the execution complied with:
 - (a) the law of the jurisdiction that determines the meaning and effect of the power of attorney pursuant to Section 75A-2-107; or
 - (b) the requirements for a military power of attorney pursuant to 10 U.S.C. Sec. 1044b.
- (4) Except as otherwise provided by statute other than this chapter, a photocopy or electronically transmitted copy of an original power of attorney has the same effect as the original. For transactions involving real property, the copy of the power of attorney may be recorded in the county where the transaction lies when attached to an affidavit of the person accepting the power of attorney.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-107 Meaning and effect of power of attorney.

The meaning and effect of a power of attorney is determined by the law of the jurisdiction indicated in the power of attorney and, in the absence of an indication of jurisdiction, by the law of the jurisdiction in which the power of attorney was executed.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-108 Nomination of conservator or guardian -- Adequacy of power of attorney -- Relation of agent to conservator or other fiduciary.

- (1) In a power of attorney, a principal may nominate a conservator of the principal's estate or a guardian of the principal's person for consideration by the court if protective proceedings, as defined in Section 75-1-201, for the principal's estate or person are begun after the principal executes the power of attorney.
- (2) If a principal executes a power of attorney and a petition is filed to appoint a conservator of the principal's estate, the court shall consider whether:
 - (a) the provisions in the power of attorney are adequate to manage and protect the principal's estate without appointing a conservator; or
 - (b) the appointment of a conservator is necessary to manage and protect the principal's estate.
- (3) If the court appoints a conservator of the principal's estate or a guardian of the principal's person, the court shall appoint a conservator or a guardian in accordance with the principal's most recent nomination unless there is good cause shown or disqualification.
- (4) If, after a principal executes a power of attorney, the court determines that an appointment of a conservator or other fiduciary is necessary to manage and protect some or all of the principal's estate:
 - (a) the agent named in the principal's power of attorney is accountable to the conservator or other fiduciary as well as the principal; and
 - (b) the power of attorney is not terminated and the agent's authority continues unless limited, suspended, or terminated by the court.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-109 When power of attorney is effective.

- (1) A power of attorney is effective when executed unless the principal provides in the power of attorney that it becomes effective at a future date or upon the occurrence of a future event or contingency.
- (2) If a power of attorney becomes effective upon the occurrence of a future event or contingency, the principal, in the power of attorney, may authorize one or more persons to determine in a writing or other record that the event or contingency has occurred.
- (3) If a power of attorney becomes effective upon the principal's incapacity and the principal has not authorized a person to determine whether the principal is incapacitated, or the person authorized is unable or unwilling to make the determination, the power of attorney becomes effective upon a determination in a writing or other record by:
 - (a) a physician that the principal is incapacitated within the meaning of Subsection 75A-2-102(14)(a); or
 - (b) an attorney at law, a judge, or an appropriate governmental official that the principal is incapacitated within the meaning of Subsection 75A-2-102(14)(b).
- (4) A person authorized by the principal in the power of attorney to determine that the principal is incapacitated may act as the principal's personal representative pursuant to the Health Insurance Portability and Accountability Act, Sections 1171 through 1179 of the Social Security Act, 42 U.S.C. Sec. 1320d, and applicable regulations, to obtain access to the principal's health care information and communicate with the principal's health care provider.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-110 Termination of power of attorney or agent's authority.

- (1) A power of attorney terminates when:
 - (a) the principal dies;
 - (b) the principal becomes incapacitated, if the power of attorney is not durable;
 - (c) the principal revokes the power of attorney;
 - (d) the power of attorney provides that it terminates;
 - (e) the purpose of the power of attorney is accomplished; or
 - (f) the principal revokes the agent's authority or the agent dies, becomes incapacitated, or resigns, and the power of attorney does not provide for another agent to act under the power of attorney.
- (2) An agent's authority terminates when:
 - (a) the principal revokes the authority;
 - (b) the agent dies, becomes incapacitated, or resigns;
 - (c) an action is filed for the dissolution or annulment of the agent's marriage to the principal or their legal separation, unless the power of attorney otherwise provides; or
 - (d) the power of attorney terminates.
- (3) Unless the power of attorney otherwise provides, an agent's authority is exercisable until the authority terminates under Subsection (2), notwithstanding a lapse of time since the execution of the power of attorney.
- (4)
 - (a) Termination of an agent's authority or of a power of attorney is not effective as to the agent or another person that, without actual knowledge of the termination, acts in good faith under the power of attorney.
 - (b) An act so performed, unless otherwise invalid or unenforceable, binds the principal and the principal's successors in interest.
- (5)
 - (a) Incapacity of the principal of a power of attorney that is not durable does not revoke or terminate the power of attorney as to an agent or other person that, without actual knowledge of the incapacity, acts in good faith under the power of attorney.
 - (b) An act so performed, unless otherwise invalid or unenforceable, binds the principal and the principal's successors in interest.
- (6) The execution of a power of attorney does not revoke a power of attorney previously executed by the principal unless the subsequent power of attorney provides that the previous power of attorney is revoked or that all other powers of attorney are revoked.
- (7) The principal may revoke or amend a power of attorney:
 - (a) by substantial compliance with a method provided in the terms of the power of attorney that expressly excludes all other methods for amending or revoking the power of attorney; or
 - (b) if the terms of the power of attorney do not provide a method or the method provided in the terms is not expressly made exclusive, by any other method manifesting clear and convincing evidence of the principal's intent.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-111 Coagents and successor agents.

- (1)
 - (a) A principal may designate two or more persons to act as coagents.

- (b) Unless the power of attorney otherwise provides, each coagent may exercise its authority independently.
- (2)
 - (a) A principal may designate one or more successor agents to act if an agent resigns, dies, becomes incapacitated, is not qualified to serve, or declines to serve.
 - (b) A principal may grant authority to designate one or more successor agents to an agent or other person designated by name, office, or function.
 - (c) Unless the power of attorney otherwise provides, a successor agent:
 - (i) has the same authority as that granted to the original agent; and
 - (ii) may not act until all predecessor agents have resigned, died, become incapacitated, are no longer qualified to serve, or have declined to serve.
- (3) Except as otherwise provided in the power of attorney and Subsection (4), an agent that does not participate in or conceal a breach of fiduciary duty committed by another agent, including a predecessor agent, is not liable for the actions of the other agent.
- (4)
 - (a) An agent that has accepted appointment and that has actual knowledge of a breach or imminent breach of fiduciary duty by another agent shall notify the principal and, if the principal is incapacitated, take any action reasonably appropriate in the circumstances to safeguard the principal's best interest.
 - (b) An agent that fails to notify the principal or take action as required by this subsection is liable for the reasonably foreseeable damages that could have been avoided if the agent had notified the principal or taken action.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-112 Reimbursement and compensation of agent.

Unless the power of attorney otherwise provides, an agent is entitled to reimbursement of expenses reasonably incurred on behalf of the principal and to compensation that is reasonable under the circumstances.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-113 Agent's acceptance.

Except as otherwise provided in the power of attorney, a person accepts appointment as an agent under a power of attorney by exercising authority or performing duties as an agent or by any other assertion or conduct indicating acceptance.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-114 Agent's duties.

- (1) Notwithstanding provisions in the power of attorney, an agent that has accepted appointment shall:
 - (a) act in accordance with the principal's reasonable expectations to the extent actually known by the agent and, otherwise, in the principal's best interest;
 - (b) act in good faith;
 - (c) act only within the scope of authority granted in the power of attorney; and
 - (d) comply with the terms of the power of attorney.
- (2)

- (a) Except as otherwise provided in the power of attorney or other provision of this chapter, an agent that has accepted appointment shall have no further obligation to act under the power of attorney.
- (b) However, with respect to any action taken by the agent under the power of attorney, the agent shall:
 - (i) act loyally for the principal's benefit;
 - (ii) act so as not to create a conflict of interest that impairs the agent's ability to act impartially in the principal's best interest;
 - (iii) act with the care, competence, and diligence ordinarily exercised by agents in similar circumstances;
 - (iv) keep a record of all receipts, disbursements, and transactions made on behalf of the principal;
 - (v) cooperate with a person that has authority to make health care decisions for the principal to carry out the principal's reasonable expectations to the extent actually known by the agent and, otherwise, act in the principal's best interest; and
 - (vi) attempt to preserve the principal's estate plan, to the extent actually known by the agent, if preserving the plan is consistent with the principal's best interest based on all relevant factors, including:
 - (A) the value and nature of the principal's property;
 - (B) the principal's foreseeable obligations and need for maintenance;
 - (C) minimization of taxes, including income, estate, inheritance, generation-skipping transfer, and gift taxes; and
 - (D) eligibility for a benefit, a program, or assistance under a statute, rule, or regulation.
- (3) An agent that acts in good faith is not liable to any beneficiary of the principal's estate plan for failure to preserve the plan.
- (4) An agent that acts with care, competence, and diligence for the best interest of the principal is not liable solely because the agent also benefits from the act or has an individual or conflicting interest in relation to the property or affairs of the principal.
- (5) If an agent is selected by the principal because of special skills or expertise possessed by the agent or in reliance on the agent's representation that the agent has special skills or expertise, the special skills or expertise shall be considered in determining whether the agent has acted with care, competence, and diligence under the circumstances.
- (6) Absent a breach of duty to the principal, an agent is not liable if the value of the principal's property declines.
- (7) An agent that exercises authority to delegate to another person the authority granted by the principal or that engages another person on behalf of the principal is not liable for an act, error of judgment, or default of that person if the agent exercises care, competence, and diligence in selecting and monitoring the person.
- (8)
 - (a) Except as otherwise provided in the power of attorney, an agent is not required to disclose receipts, disbursements, or transactions conducted on behalf of the principal unless ordered by a court or requested by the principal, a guardian, a conservator, another fiduciary acting for the principal, a governmental agency having authority to protect the welfare of the principal, an interested person, as defined in Section 75-1-201, after the principal's incapacity, or upon the death of the principal, by the personal representative or successor in interest of the principal's estate.

- (b) If so requested, within 30 days the agent shall comply with the request or provide a writing or other record substantiating why additional time is needed and shall comply with the request within an additional 30 days.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-115 Exoneration of agent.

A provision in a power of attorney relieving an agent of liability for breach of duty is binding on the principal and the principal's successors in interest except to the extent the provision:

- (1) relieves the agent of liability for breach of duty committed dishonestly, with an improper motive, or with reckless indifference to the purposes of the power of attorney or the best interest of the principal; or
- (2) was inserted as a result of an abuse of a confidential or fiduciary relationship with the principal.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-116 Judicial relief.

- (1) The following persons may petition a court to construe a power of attorney or review the agent's conduct and grant appropriate relief:
 - (a) the principal or the agent;
 - (b) a guardian, conservator, or other fiduciary acting for the principal;
 - (c) a person authorized to make health care decisions for the principal;
 - (d) the principal's spouse, parent as defined in Section 75-1-201, or descendant;
 - (e) an individual who would qualify as a presumptive heir of the principal;
 - (f) a person named as a beneficiary to receive any property, benefit, or contractual right on the principal's death or as a beneficiary of a trust created by or for the principal that has a financial interest in the principal's estate;
 - (g) a governmental agency having regulatory authority to protect the welfare of the principal;
 - (h) the principal's caregiver or another person that demonstrates sufficient interest in the principal's welfare; and
 - (i) a person asked to accept the power of attorney.
- (2) Upon motion by the principal, the court shall dismiss a petition filed under this section, unless the court finds that the principal lacks capacity to revoke the agent's authority or the power of attorney.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-117 Agent's liability.

An agent that violates this chapter is liable to the principal or the principal's successors in interest for the amount required to:

- (1) restore the value of the principal's property to what it would have been had the violation not occurred; and
- (2) reimburse the principal or the principal's successors in interest for the attorney fees and costs paid on the agent's behalf.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-118 Agent's resignation -- Notice.

Unless the power of attorney provides a different method for an agent's resignation, an agent may resign by giving notice to the principal and, if the principal is incapacitated:

- (1) to the guardian, if one has been appointed for the principal, and a coagent or successor agent;
or
- (2) if there is no person described in Subsection (1), to:
 - (a) the principal's caregiver;
 - (b) another person reasonably believed by the agent to have sufficient interest in the principal's welfare; or
 - (c) a governmental agency having authority to protect the welfare of the principal.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-119 Acceptance of and reliance upon acknowledged power of attorney.

- (1) As used in this section, "acknowledged" means purportedly verified before a notary public or other individual authorized to take acknowledgements.
- (2) A person that in good faith accepts an acknowledged power of attorney without actual knowledge that the signature is not genuine may rely upon the presumption under Section 75A-2-105 that the signature is genuine.
- (3) A person that in good faith accepts an acknowledged power of attorney without actual knowledge that the power of attorney is void, invalid, or terminated, that the purported agent's authority is void, invalid, or terminated, or that the agent is exceeding or improperly exercising the agent's authority may rely upon the power of attorney as if the power of attorney were genuine, valid, and still in effect, the agent's authority were genuine, valid, and still in effect, and the agent had not exceeded and had properly exercised the authority.
- (4) A person that is asked to accept an acknowledged power of attorney may request, and rely upon, without further investigation:
 - (a) an agent's certification under penalty of perjury of any factual matter concerning the principal, agent, or power of attorney;
 - (b) an English translation of the power of attorney if the power of attorney contains, in whole or in part, language other than English; and
 - (c) an opinion of counsel as to any matter of law concerning the power of attorney if the person making the request provides in a writing or other record the reason for the request.
- (5) An English translation or an opinion of counsel requested under this section shall be provided at the principal's expense unless the request is made more than seven business days after the power of attorney is presented for acceptance.
- (6) For purposes of this section and Section 75A-2-120, a person that conducts activities through employees is without actual knowledge of a fact relating to a power of attorney, a principal, or an agent if the employee conducting the transaction involving the power of attorney is without actual knowledge of the fact.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-120 Liability for refusal to accept acknowledged power of attorney.

- (1) As used in this section, "acknowledged" means the same as that term is defined in Section 75A-2-119.
- (2) Except as otherwise provided in Subsection (3):

- (a) a person shall either accept an acknowledged power of attorney or request a certification, a translation, or an opinion of counsel under Subsection 75A-2-119(4) no later than seven business days after presentation of the power of attorney for acceptance;
 - (b) if a person requests a certification, a translation, or an opinion of counsel under Subsection 75A-2-119(4), the person shall accept the power of attorney no later than five business days after receipt of the certification, translation, or opinion of counsel; and
 - (c) a person may not require an additional or different form of power of attorney for authority granted in the power of attorney presented.
- (3) A person is not required to accept an acknowledged power of attorney if:
- (a) the person is not otherwise required to engage in a transaction with the principal in the same circumstances;
 - (b) engaging in a transaction with the agent or the principal in the same circumstances would be inconsistent with federal law;
 - (c) the person has actual knowledge of the termination of the agent's authority or of the power of attorney before exercise of the power;
 - (d) a request for a certification, a translation, or an opinion of counsel under Subsection 75A-2-119(4) is refused;
 - (e) the person in good faith believes that the power is not valid or that the agent does not have the authority to perform the act requested, whether or not a certification, a translation, or an opinion of counsel under Subsection 75A-2-119(4) has been requested or provided; or
 - (f) the person makes, or has actual knowledge that another person has made, a report to the Division of Aging and Adult Services stating a good faith belief that the principal may be subject to physical or financial abuse, neglect, exploitation, or abandonment by the agent or a person acting for or with the agent.
- (4) A person that refuses in violation of this section to accept an acknowledged power of attorney is subject to:
- (a) a court order mandating acceptance of the power of attorney; and
 - (b) liability for reasonable attorney fees and costs incurred in any action or proceeding that confirms the validity of the power of attorney or mandates acceptance of the power of attorney.
- (5) Court proceedings under this section shall be conducted pursuant to the terms in the Uniform Probate Code governing venue and procedures.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-121 Principles of law and equity.

Unless displaced by a provision of this chapter, the principles of law and equity supplement this act.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-122 Laws applicable to financial institutions and entities.

This chapter does not supersede any other law applicable to financial institutions or other entities, and the other law controls if inconsistent with this chapter.

Renumbered and Amended by Chapter 364, 2024 General Session

75A-2-123 Remedies under other law.

The remedies under this chapter are not exclusive and do not abrogate any right or remedy under the law of this state other than this chapter.

Renumbered and Amended by Chapter 364, 2024 General Session