ADD DATE

ADD NAME & ADDRESS

Re: Request for Disclosure

Dear: ADD NAME

My name is ADD NAME and I am an Adult Protective Services (APS) Adults at Risk Social Worker for County Department of Human Services, a government agency having regulatory authority to protect the welfare of ADD PERSON’S NAME.

I understand that you have been acting as ADD PERSON’S NAME agent under a Durable Power of Attorney for Finances. Under section 244.14 of the Wisconsin Statutes, you have a fiduciary duty to act in good faith, within the scope of the authority granted in the power of attorney document. A fiduciary also has a legal obligation to act:

* in a trustworthy and honest manner on behalf of those he/she represents, and
* in the individuals best interests; they must set aside their own personal motivations in favor of the principle’s goals and well being.

I am requesting that you provide me the following documentation regarding your management of ADD PERSON’S NAME accounts and finances:

1. ADD REQUESTS HERE

Pursuant to section 244.14 (9) of the Wisconsin Statutes, you have 30 days to provide the requested information to me in writing, addressed to me at:

If you cannot comply with this request within this time frame LIST DATE 30 DAYS FROM DATE OF LETTER, you must provide me, in writing, the reason additional time is needed.

All documentation provided should be legible and complete.

Sincerely,

ADD YOUR SIGNATURE

ADD YOUR NAME

APS Adults at Risk Social Worker

 County Human Services

Enc.

Section 244.14 of Wisconsin Statutes, regarding powers of attorney for finances

(8)  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 one of the following:

(a) The principal.

(b) A guardian, a conservator, or another fiduciary acting for the principal.

(c) A governmental agency having regulatory authority to protect the welfare of the principal.

(d) Upon the death of the principal, by the personal representative or successor in interest of the principal's estate.

(9)  If ordered or requested to disclose information under sub. (8), the agent shall comply with the request within 30 days or provide a writing or other record substantiating why additional time is needed and shall comply with the request within an additional 30 days.