A. Determine the Actors

Actors:

- **Person A**: the witness
- **Person B**: the donor
- **Person C**: the donor’s signatory

B. Follow Each Applicable Step

**STEP 1: Confirm identity**

Person A satisfies themselves as to the identity of Person B (and, if applicable, Person C) by way of:

(a) Person B or C being personally known to Person A; or
(b) Person B or C proving their identity to the satisfaction of Person A.

**STEP 2: Confirm communication method satisfactory**

Person A and Person B (and, if applicable, Person C) confirm that they are able to see and hear one another while the action is being taken.

**STEP 3: Confirm Document**

Person A sees the document in Person B’s possession before Person B signs it or acknowledges the signing by Person C.

*Consider: Who is signing the document – Donor or Donor’s Signatory?*

**STEP 4A: See Document Signed**

Person A sees Person B sign the document.

**OR**

**STEP 4B: See signature and acknowledgement**
Person A sees Person C sign the document, Person A sees Person B acknowledge the signature of Person C, and, if Person B is capable of acknowledging the signature audibly, Person A hears Person B acknowledge the signature of Person C.

**STEP 5: Confirm same document**
Person A sees the document immediately after Person B or C signs it.

**STEP 6: Receive signed document**
Person A receives the signed document and is satisfied that

(a) it is the same one that Person A saw in Person B's possession;  
(b) the signature on the document matches the one Person A saw being made.

**STEP 7: Sign document and confirm how identity was verified**
Person A signs the document and records in writing that the document was signed through a glass or plexiglass partition or by videoconference and how Person A satisfied themselves as to the identity of Person B (and, if applicable, Person C).

**C. ADDITIONAL REQUIREMENTS OR STEPS**
The donor's signatory is an individual who meets the requirements in subsection 10(2) of *The Powers of Attorney Act*.

The following additional step must be completed:

**STEP 8: Sign power of attorney certificate**
Person A must sign a statement certifying that Person A is not the attorney or the attorney's spouse or common-law partner and to the best of Person A's knowledge,

(a) the power of attorney was signed by Person B or, if applicable, the signature of Person C was acknowledged by Person B;  
(b) if applicable, Person C is not the attorney or the attorney's spouse or common-law partner;  
(c) Person B appeared to understand the nature of the power of attorney;  
(d) Person B appeared to agree voluntarily to sign or acknowledge the power of attorney; and  
(e) the power of attorney was signed by Person B or, if applicable, Person C while Person B was physically apart from the attorney.

The Power of Attorney Certificate should be placed within the client file.