



Major Inefficiencies of not going paperless.

Inefficiency: Managing and maintaining Power of Attorney

The issue

A power of attorney temporarily or permanently modifies an existing account. Powers of Attorney are generally requested for each transaction because there has not been a “good method” for storage and retrieval. In fact, this places an unnecessary burden on the member’s attorney.

Ask yourself these questions:

- Where are Powers of Attorney filed?
- How do branch personnel access forms?