

The 380+ automated forms in this volume are designed to be the cornerstone of an estate planning practice. Lipman's Wills & Trusts is sophisticated enough for any high-end estate planning project, yet simple and flexible enough to handle smaller estates as well. The forms in this volume cover all aspects of estate planning, including the preparation of wills, living trusts, powers of attorney, advance health care directives, HIPAA releases, irrevocable trusts, buy-sell agreements, and even marital property agreements.

CH. 1 -- HUSBAND'S WILLS

- 1-1 Simple - short version
- 1-2 Simple - long version
- 1-3 Pourover - short version
- 1-4 Pourover - long version
- 1-5 Bypass Trust only - no marital trust
- 1-6 Bypass &/or QTIP
- 1-7 Bypass &/or QTIP with separate share trusts
- 1-8 Bypass & QTIP with GST exempt trusts
- 1-9 Bypass & QTIP with GST exempt & nonexempt trusts

CH. 2 -- WIFE'S WILLS

- 2-1 Simple - short version
- 2-2 Simple - long version
- 2-3 Pourover - short version
- 2-4 Pourover - long version
- 2-5 Bypass Trust only - no marital trust
- 2-6 Bypass &/or QTIP
- 2-7 Bypass &/or QTIP with separate share trusts
- 2-8 Bypass & QTIP with GST exempt trusts
- 2-9 Bypass & QTIP with GST exempt & nonexempt trusts

CH. 3 -- INDIVIDUAL'S WILLS

- 3-1 Simple
- 3-2 Pourover - short version
- 3-3 Pourover - long version
- 3-4 Family - Sprinkle Trust
- 3-5 Separate Share Trusts
- 3-6 Separate Share Trusts - GST exempt trusts only
- 3-7 Separate Share GST exempt & nonexempt trusts

CH. 4 -- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1 WILLS

- 4-1 Simple
- 4-2 Pourover - short version
- 4-3 Pourover - long version
- 4-4 Trust for Partner, then separate share trusts
- 4-5 Separate Share Trusts for one or more beneficiaries

CH. 5 -- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2 WILLS

- 5-1 Simple
- 5-2 Pourover - short version
- 5-3 Pourover - long version
- 5-4 Trust for Partner, then separate share trusts
- 5-5 Separate Share Trusts for one or more beneficiaries

CH. 6 -- HUSBAND'S MISCELLANEOUS DOCUMENTS

- 6-1 Durable Power of Attorney
- 6-1(a) Notice to Person Executing Durable Power of Attorney
- 6-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact
- 6-1(c) Affidavit of Agent
- 6-1(d) Affidavit of Physician (that Husband lacks capacity)
- 6-1(e) California Probate Code Provisions
- 6-2 Advance Health Care Directive
- 6-3 HIPAA Release
- 6-4 Codicil

- 6-5 Revocation of Power of Attorney
- 6-6 Video Will Checklist
- 6-7 Nomination of Conservator
- 6-8 Declaration For Mental Health Treatment
- 6-9 Designation of Health Care Agent for Children
- 6-10 Nomination of Guardian for Children
- 6-11 Memorandum Regarding Personal Belongings

CH. 7 -- WIFE'S MISCELLANEOUS DOCUMENTS

- 7-1 Durable Power of Attorney
- 7-1(a) Notice to Person Executing Durable Power of Attorney
- 7-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact
- 7-1(c) Affidavit of Agent
- 7-1(d) Affidavit of Physician (that Wife lacks capacity)
- 7-1(e) California Probate Code Provisions
- 7-2 Advance Health Care Directive
- 7-3 HIPAA Release
- 7-4 Codicil
- 7-5 Revocation of Power of Attorney
- 7-6 Video Will Checklist
- 7-7 Nomination of Conservator
- 7-8 Declaration For Mental Health Treatment
- 7-9 Designation of Health Care Agent for Children
- 7-10 Nomination of Guardian for Children
- 7-11 Memorandum Regarding Personal Belongings

CH. 8 -- INDIVIDUAL'S MISCELLANEOUS DOCUMENTS

- 8-1 Durable Power of Attorney
- 8-1(a) Notice to Person Executing Durable Power of Attorney
- 8-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact
- 8-1(c) Affidavit of Agent
- 8-1(d) Affidavit of Physician (that Individual lacks capacity)
- 8-1(e) California Probate Code Provisions
- 8-2 Advance Health Care Directive
- 8-3 HIPAA Release
- 8-4 Codicil
- 8-5 Revocation of Power of Attorney
- 8-6 Video Will Checklist
- 8-7 Nomination of Conservator
- 8-8 Declaration For Mental Health Treatment
- 8-9 Designation of Health Care Agent for Children
- 8-10 Nomination of Guardian for Children
- 8-11 Memorandum Regarding Personal Belongings

CH. 9 -- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1 MISC DOCUMENTS

- 9-1 Durable Power of Attorney
- 9-1(a) Notice to Person Executing Durable Power of Attorney
- 9-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact
- 9-1(c) Affidavit of Agent
- 9-1(d) Affidavit of Physician (that Spouse/DP #1 lacks capacity)
- 9-1(e) California Probate Code Provisions
- 9-2 Advance Health Care Directive
- 9-3 HIPAA Release
- 9-4 Codicil

- 9-5 Revocation of Power of Attorney
- 9-6 Video Will Checklist
- 9-7 Nomination of Conservator
- 9-8 Declaration For Mental Health Treatment
- 9-9 Designation of Health Care Agent for Children
- 9-10 Nomination of Guardian for Children
- 9-11 Memorandum Regarding Personal Belongings

CH. 10 -- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2 MISC DOCUMENTS

- 10-1 Durable Power of Attorney
- 10-1(a) Notice to Person Executing Durable Power of Attorney
- 10-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact
- 10-1(c) Affidavit of Agent
- 10-1(d) Affidavit of Physician (that Spouse/DP #2 lacks capacity)
- 10-1(e) California Probate Code Provisions
- 10-2 Advance Health Care Directive
- 10-3 HIPAA Release
- 10-4 Codicil
- 10-5 Revocation of Power of Attorney
- 10-6 Video Will Checklist
- 10-7 Nomination of Conservator
- 10-8 Declaration For Mental Health Treatment
- 10-9 Designation of Health Care Agent for Children
- 10-10 Nomination of Guardian for Children
- 10-11 Memorandum Regarding Personal Belongings

CH. 11 -- HUSBAND'S & WIFE'S REVOCABLE LIVING TRUSTS

- 11-1 Blind Trust
- 11-2 Simple - outright to beneficiaries
- 11-3 Simple - with separate share trusts
- 11-4 Bypass &/or QTIP
- 11-5 Bypass &/or QTIP with separate share trusts
- 11-6 Bypass & QTIP with GST exempt trusts
- 11-7 Bypass & QTIP with GST exempt & nonexempt trusts

CH. 12 -- HUSBAND'S REVOCABLE LIVING TRUSTS

- 12-1 Simple - outright to beneficiaries
- 12-2 Simple - with separate share trusts
- 12-3 Bypass &/or QTIP
- 12-4 Bypass &/or QTIP with separate share trusts
- 12-5 Bypass & QTIP with GST exempt trusts
- 12-6 Bypass & QTIP with GST exempt & nonexempt trusts

CH. 13 -- WIFE'S REVOCABLE LIVING TRUSTS

- 13-1 Simple - outright to beneficiaries
- 13-2 Simple - with separate share trusts
- 13-3 Bypass &/or QTIP
- 13-4 Bypass &/or QTIP with separate share trusts
- 13-5 Bypass & QTIP with GST exempt trusts
- 13-6 Bypass & QTIP with GST exempt & nonexempt trusts

CH. 14 -- INDIVIDUAL'S REVOCABLE LIVING TRUSTS

- 14-1 Blind Trust (Individual's Revocable Trust)
- 14-2 Simple - outright to beneficiaries (Individual's Revocable Trust)
- 14-3 Family - Sprinkle Trust (Individual's Revocable Trust)
- 14-4 Separate Share Trusts (Individual's Revocable Trust)

CH. 15 -- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1 REVOCABLE LIVING TRUSTS

- 15-1 Simple - outright to beneficiaries
- 15-2 Trust for partner, then separate share trusts
- 15-3 Separate Share Trusts for one or more beneficiaries

CH. 16 -- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2 REVOCABLE LIVING TRUSTS

- 16-1 Simple - outright to beneficiaries
- 16-2 Trust for partner, then separate share trusts
- 16-3 Separate Share Trusts for one or more beneficiaries

CH. 17 -- HUSBAND & WIFE'S MISCELLANEOUS REVOCABLE TRUST FORMS

- 17-1 Memorandum Regarding Funding of Revocable Trust
- 17-2 Deed Transferring Property to Revocable Trust

- 17-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 17-4 Certification of Trust (for H&W's Revocable Trust)
- 17-5 Memorandum Regarding Transfer of Accounts
- 17-6 Assignment of Property to Revocable Trust
- 17-7 Amendment to Revocable Trust

CH. 18 -- HUSBAND'S MISCELLANEOUS REVOCABLE TRUST FORMS

- 18-1 Memorandum Regarding Funding of Revocable Trust
- 18-2 Deed Transferring Property to Revocable Trust
- 18-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 18-4 Certification of Trust (for Husband's Revocable Trust)
- 18-5 Memorandum Regarding Transfer of Accounts
- 18-6 Assignment of Property to Revocable Trust
- 18-7 Amendment to Revocable Trust

CH. 19 -- WIFE'S MISCELLANEOUS REVOCABLE TRUST FORMS

- 19-1 Memorandum Regarding Funding of Revocable Trust
- 19-2 Deed Transferring Property to Revocable Trust
- 19-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 19-4 Certification of Trust (for Wife's Revocable Trust)
- 19-5 Memorandum Regarding Transfer of Accounts
- 19-6 Assignment of Property to Revocable Trust
- 19-7 Amendment to Revocable Trust

CH. 20 -- INDIVIDUAL'S MISCELLANEOUS REVOCABLE TRUST FORMS

- 20-1 Memorandum Regarding Funding of Revocable Trust
- 20-2 Deed Transferring Property to Revocable Trust
- 20-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 20-4 Certification of Trust (for Individual's Revocable Trust)
- 20-5 Memorandum Regarding Transfer of Accounts
- 20-6 Assignment of Property to Revocable Trust
- 20-7 Amendment to Revocable Trust

CH. 21 -- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1'S MISC REV TRUST FORMS

- 21-1 Memorandum Regarding Funding of Revocable Trust
- 21-2 Deed Transferring Property to Revocable Trust
- 21-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 21-4 Certification of Trust (for Spouse/DP #1 Revocable Trust)
- 21-5 Memorandum Regarding Transfer of Accounts
- 21-6 Assignment of Property to Revocable Trust
- 21-7 Amendment to Revocable Trust

CH. 22 -- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2'S MISC REV TRUST FORMS

- 22-1 Memorandum Regarding Funding of Revocable Trust
- 22-2 Deed Transferring Property to Revocable Trust
- 22-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 22-4 Certification of Trust (for Spouse/DP #2 Revocable Trust)
- 22-5 Memorandum Regarding Transfer of Accounts
- 22-6 Assignment of Property to Revocable Trust
- 22-7 Amendment to Revocable Trust

CH. 23 -- INVESTMENT TRUSTS (IDGT OPTIONAL)

- 23-1 SEPARATE INVESTMENT TRUSTS - no insurance (H&W settlors)
- 23-1(a) Memorandum Regarding Funding of Trust (for Form 23-1)
- 23-1(b) Withdrawal Letters (for Form 23-1)
- 23-1(c) Form to Alter Withdrawal Rights (for Form 23-1)
- 23-1(d) Certification of Trust (for Form 23-1)
- 23-2 INVESTMENT "SPRINKLE" TRUST - no insurance (H&W settlors)
- 23-2(a) Memorandum Regarding Funding of Trust (for Form 23-2)
- 23-2(b) Withdrawal Letters (for Form 23-2)
- 23-2(c) Form to Alter Withdrawal Rights (for Form 23-2)
- 23-2(d) Certification of Trust (for Form 23-2)
- 23-3 SEPARATE INVESTMENT TRUSTS - no insurance (Individual settlor)
- 23-3(a) Memorandum Regarding Funding of Trust (for Form 23-3)
- 23-3(b) Withdrawal Letters (for Form 23-3)
- 23-3(c) Form to Alter Withdrawal Rights (for Form 23-3)
- 23-3(d) Certification of Trust (for Form 23-3)
- 23-4 INVESTMENT "SPRINKLE" TRUST - no insurance (Individual settlor)
- 23-4(a) Memorandum Regarding Funding of Trust (for Form 23-4)
- 23-4(b) Withdrawal Letters (for Form 23-4)

- 23-4(c) Form to Alter Withdrawal Rights (for Form 23-4)
 23-4(d) Certification of Trust (for Form 23-4)

CH. 24 -- S CORPORATION TRUSTS

- 24-1 QUALIFIED S CORPORATION TRUSTS (H&W settlors)
 24-1(a) Memorandum Regarding Funding of Trust (for Form 24-1)
 24-1(b) Withdrawal Letters (for Form 24-1)
 24-1(c) Form to Alter Withdrawal Rights (for Form 24-1)
 24-1(d) Certification of Trust (for Form 24-1)
 24-2 QUALIFIED S CORPORATION TRUSTS (Individual settlor)
 24-2(a) Memorandum Regarding Funding of Trust (for Form 24-2)
 24-2(b) Withdrawal Letters (for Form 24-2)
 24-2(c) Form to Alter Withdrawal Rights (for Form 24-2)
 24-2(d) Certification of Trust (for Form 24-2)

CH. 25 -- GRANDCHILDREN'S TRUSTS

- 25-1 GRANDCHILDREN'S TRUSTS - GST qualifying (H&W settlors)
 25-1(a) Memorandum Regarding Funding of Trust (for Form 25-1)
 25-1(b) Withdrawal Letters (for Form 25-1)
 25-1(c) Form to Alter Withdrawal Rights (for Form 25-1)
 25-1(d) Certification of Trust (for Form 25-1)
 25-2 GRANDCHILDREN'S TRUSTS - GST qualifying (Individual settlor)
 25-2(a) Memorandum Regarding Funding of Trust (for Form 25-2)
 25-2(b) Withdrawal Letters (for Form 25-2)
 25-2(c) Form to Alter Withdrawal Rights (for Form 25-2)
 25-2(d) Certification of Trust (for Form 25-2)

CH. 26 -- LIFE INSURANCE TRUSTS

- 26-1 SECOND TO DIE LIFE INSURANCE TRUST (H&W settlors)
 26-1(a) Memorandum Regarding Funding of Trust (for Form 26-1)
 26-1(b) Withdrawal Letters (for Form 26-1)
 26-1(c) Form to Alter Withdrawal Rights (for Form 26-1)
 26-1(d) Letter to Insurance Agent (for Form 26-1)
 26-1(e) Certification of Trust (for Form 26-1)
 26-2 WIFE PRIMARY BENEF LIFE INSURANCE TRUST - Insurance on HUSBAND (Husband settlor)
 26-2(a) Memorandum Regarding Funding of Trust (for Form 26-2)
 26-2(b) Withdrawal Letters (for Form 26-2)
 26-2(c) Form to Alter Withdrawal Rights (for Form 26-2)
 26-2(d) Letter to Insurance Agent (for Form 26-2)
 26-2(e) Certification of Trust (for Form 26-2)
 26-2(f) Transmutation Agreement for Insurance Policies (for Form 26-2)
 26-2(g) Transmutation Agreement for Cash (for Form 26-2)
 26-3 HUSBAND PRIMARY BENEF LIFE INSURANCE TRUST - Insurance on Wife (Wife settlor)
 26-3(a) Memorandum Regarding Funding of Trust (for Form 26-3)
 26-3(b) Withdrawal Letters (for Form 26-3)
 26-3(c) Form to Alter Withdrawal Rights (for Form 26-3)
 26-3(d) Letter to Insurance Agent (for Form 26-3)
 26-3(e) Certification of Trust (for Form 26-3)
 26-3(f) Transmutation Agreement for Insurance Policies (for Form 26-3)
 26-3(g) Transmutation Agreement for Cash (for Form 26-3)
 26-4 LIFE INSURANCE TRUSTS FOR CHILDREN - Insurance on HUSBAND (H&W settlors)
 26-4(a) Memorandum Regarding Funding of Trust (for Form 26-4)
 26-4(b) Withdrawal Letters (for Form 26-4)
 26-4(c) Form to Alter Withdrawal Rights (for Form 26-4)
 26-4(d) Letter to Insurance Agent (for Form 26-4)
 26-4(e) Certification of Trust (for Form 26-4)
 26-5 LIFE INSURANCE TRUSTS FOR CHILDREN - Insurance on Wife (H&W settlors)
 26-5(a) Memorandum Regarding Funding of Trust (for Form 26-5)
 26-5(b) Withdrawal Letters (for Form 26-5)
 26-5(c) Form to Alter Withdrawal Rights (for Form 26-5)
 26-5(d) Letter to Insurance Agent (for Form 26-5)
 26-5(e) Certification of Trust (for Form 26-5)
 26-6 LIFE INSURANCE "SPRINKLE" TRUST - Insurance on H&W (H&W settlors)
 26-6(a) Memorandum Regarding Funding of Trust (for Form 26-6)
 26-6(b) Withdrawal Letters (for Form 26-6)

- 26-6(c) Form to Alter Withdrawal Rights (for Form 26-6)
 26-6(d) Letter to Insurance Agent (for Form 26-6)
 26-6(e) Certification of Trust (for Form 26-6)
 26-7 LIFE INSURANCE TRUSTS FOR CHILDREN (Individual settlor)
 26-7(a) Memorandum Regarding Funding of Trust (for Form 26-7)
 26-7(b) Withdrawal Letters (for Form 26-7)
 26-7(c) Form to Alter Withdrawal Rights (for Form 26-7)
 26-7(d) Letter to Insurance Agent (for Form 26-7)
 26-7(e) Certification of Trust (for Form 26-7)
 26-8 LIFE INSURANCE "SPRINKLE" TRUST - Insurance on Individual (Individual settlor)
 26-8(a) Memorandum Regarding Funding of Trust (for Form 26-8)
 26-8(b) Withdrawal Letters (for Form 26-8)
 26-8(c) Form to Alter Withdrawal Rights (for Form 26-8)
 26-8(d) Letter to Insurance Agent (for Form 26-8)
 26-8(e) Certification of Trust (for Form 26-8)

CH. 27 -- QUALIFIED PERSONAL RESIDENCE TRUSTS

- 27-1(a) Memorandum Regarding Funding of Trust (for Form 27-1)
 27-1(b) Deed Transferring Home to Trust (for Form 27-1)
 27-1(c) Certification of Trust (for Form 27-1)
 27-2 QUALIFIED PERSONAL RESIDENCE TRUST (Husband settlor)
 27-2(a) Memorandum Regarding Funding of Trust (for Form 27-2)
 27-2(b) Deed Transferring Home to Trust (for Form 27-2)
 27-2(c) Certification of Trust (for Form 27-2)
 27-3 QUALIFIED PERSONAL RESIDENCE TRUST (Wife settlor)
 27-3(a) Memorandum Regarding Funding of Trust (for Form 27-3)
 27-3(b) Deed Transferring Home to Trust (for Form 27-3)
 27-3(c) Certification of Trust (for Form 27-3)
 27-4 QUALIFIED PERSONAL RESIDENCE TRUST (Individual settlor)
 27-4(a) Memorandum Regarding Funding of Trust (for Form 27-4)
 27-4(b) Deed Transferring Home to Trust (for Form 27-4)
 27-4(c) Certification of Trust (for Form 27-4)

CH. 28 -- CHARITABLE REMAINDER ANNUITY TRUSTS

- 28-1 CHARITABLE REMAINDER ANNUITY TRUST (H&W settlors)
 28-1(a) Memorandum Regarding Funding of Trust (for Form 28-1)
 28-1(b) Certification of Trust (for Form 28-1)
 28-2 CHARITABLE REMAINDER ANNUITY TRUST (Husband settlor)
 28-2(a) Memorandum Regarding Funding of Trust (for Form 28-2)
 28-2(b) Certification of Trust (for Form 28-2)
 28-3 CHARITABLE REMAINDER ANNUITY TRUST (Wife settlor)
 28-3(a) Memorandum Regarding Funding of Trust (for Form 28-3)
 28-3(b) Certification of Trust (for Form 28-3)
 28-4 CHARITABLE REMAINDER ANNUITY TRUST (Individual settlor)
 28-4(a) Memorandum Regarding Funding of Trust (for Form 28-4)
 28-4(b) Certification of Trust (for Form 28-4)

CH. 29 -- CHARITABLE REMAINDER UNITRUSTS

- 29-1 CHARITABLE REMAINDER UNITRUST (H&W settlors)
 29-1(a) Memorandum Regarding Funding of Trust (for Form 29-1)
 29-1(b) Certification of Trust (for Form 29-1)
 29-2 CHARITABLE REMAINDER UNITRUST (Husband settlor)
 29-2(a) Memorandum Regarding Funding of Trust (for Form 29-2)
 29-2(b) Certification of Trust (for Form 29-2)
 29-3 CHARITABLE REMAINDER UNITRUST (Wife settlor)
 29-3(a) Memorandum Regarding Funding of Trust (for Form 29-3)
 29-3(b) Certification of Trust (for Form 29-3)
 29-4 CHARITABLE REMAINDER UNITRUST (Individual settlor)
 29-4(a) Memorandum Regarding Funding of Trust (for Form 29-4)
 29-4(b) Certification of Trust (for Form 29-4)

CH. 30 -- GRANTOR RETAINED ANNUITY TRUSTS

- 30-1 GRANTOR RETAINED ANNUITY TRUST (Husband settlor)
 30-1(a) Memorandum Regarding Funding of Trust (for Form 30-1)
 30-1(b) Certification of Trust (for Form 30-1)
 30-2 GRANTOR RETAINED ANNUITY TRUST (Wife settlor)
 30-2(a) Memorandum Regarding Funding of Trust (for Form 30-2)
 30-2(b) Certification of Trust (for Form 30-2)

- 30-3 GRANTOR RETAINED ANNUITY TRUST (Individual settlor)
- 30-3(a) Memorandum Regarding Funding of Trust (for Form 30-3)
- 30-3(b) Certification of Trust (for Form 30-3)

CH. 31 -- GRANTOR RETAINED UNITRUSTS

- 31-1 GRANTOR RETAINED UNITRUST (Husband settlor)
- 31-1(a) Memorandum Regarding Funding of Trust (for Form 31-1)
- 31-1(b) Certification of Trust (for Form 31-1)
- 31-2 GRANTOR RETAINED UNITRUST (Wife settlor)
- 31-2(a) Memorandum Regarding Funding of Trust (for Form 31-2)
- 31-2(b) Certification of Trust (for Form 31-2)
- 31-3 GRANTOR RETAINED UNITRUST (Individual settlor)
- 31-3(a) Memorandum Regarding Funding of Trust (for Form 31-3)
- 31-3(b) Certification of Trust (for Form 31-3)

CH. 32 -- SUPPLEMENTAL NEEDS TRUSTS -- (D)(4)(A) OPTIONAL

- 32-1 SUPPLEMENTAL NEEDS TRUST (H&W settlors)
- 32-1(a) Memorandum Regarding Funding of Trust (for Form 32-1)
- 32-1(b) Certification of Trust (for Form 32-1)
- 32-2 SUPPLEMENTAL NEEDS TRUST (Husband settlor)
- 32-2(a) Memorandum Regarding Funding of Trust (for Form 32-2)
- 32-2(b) Certification of Trust (for Form 32-2)
- 32-3 SUPPLEMENTAL NEEDS TRUST (Wife settlor)
- 32-3(a) Memorandum Regarding Funding of Trust (for Form 32-3)
- 32-3(b) Certification of Trust (for Form 32-3)
- 32-4 SUPPLEMENTAL NEEDS TRUST (Individual settlor)
- 32-4(a) Memorandum Regarding Funding of Trust (for Form 32-4)
- 32-4(b) Certification of Trust (for Form 32-4)

CH. 42 -- BUY SELL AGREEMENTS

- 42-1 Wait and See Buy Sell Agreement
- 42-2 Cross Purchase Buy Sell Agreement
- 42-3 Stock Redemption Buy Sell Agreement

CH. 43 -- MARITAL PROPERTY AGREEMENTS

- 43-1 Postmarital Property Agreement - cash and specified assets
- 43-1(a) Voluntary Waiver of Further Disclosure (for use with Form 43-3)
- 43-2 Agreement to Transmute Sep Prop to Community Prop

CH. 50 -- PRELIMINARY INFORMATION FORMS

- 50-1 Preliminary Information (for Husband & Wife)
- 50-2 Preliminary Information (for Individual)
- 50-3 Preliminary Information (for Same-sex Spouses/Domestic Partners)

CH. 51 -- FACT FINDERS

- 51-1 Attorney Fact Finder (for Husband & Wife)
- 51-2 Attorney Fact Finder (for Individual)
- 51-3 Attorney Fact Finder (for Same-sex Spouses/Domestic Partners)

CH. 52 -- FEE AGREEMENTS

- 52-1 Fee Agreement (for Married client)
- 52-2 Fee Agreement (for Individual client)
- 52-3 Fee Agreement (for one Same-sex Spouse/Domestic Partner)
- 52-4 Fee Agreement (for two Same-sex Spouses/Domestic Partners)

CH. 53 -- LETTERS

- 53-1 Letter Sent with Drafts
- 53-2 Letter Sent with Signed Originals
- 53-3 Written Notice to Depositor
- 53-4 Written Notice to Depositor
- 53-5 Written Notice to Depositor
- 53-6 Written Notice to Depositor
- 53-7 Written Notice to Depositor

CH. 54 -- WILL & CODICIL SIGNING CEREMONY

- 54-1 Will & Codicil Signing Ceremony (for Husband & Wife)
- 54-2 Will & Codicil Signing Ceremony (for Individual)
- 54-3 Will & Codicil Signing Ceremony (for Same-sex Spouse #1/ DP #1)
- 54-4 Will & Codicil Signing Ceremony (for Same-sex Spouse #2/ DP #2)