

The 400+ 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.

## WILLS

### HUSBAND'S WILLS

- 1-101 Will - Simple - outright to beneficiaries
- 1-102 Will - Simple - with separate share trusts
- 1-103 Will - Pourover - short version
- 1-104 Will - Pourover - long version
- 1-105 Will - Bypass Trust only - no marital trust
- 1-106 Will - Bypass &/or QTIP
- 1-107 Will - Bypass &/or QTIP with separate share trusts
- 1-108 Will - Bypass & QTIP with GST exempt trusts
- 1-109 Will - Bypass & QTIP with GST exempt & nonexempt trusts

### WIFE'S WILLS

- 1-201 Will - Simple - outright to beneficiaries
- 1-202 Will - Simple - with separate share trusts
- 1-203 Will - Pourover - short version
- 1-204 Will - Pourover - long version
- 1-205 Will - Bypass Trust only - no marital trust
- 1-206 Will - Bypass &/or QTIP
- 1-207 Will - Bypass &/or QTIP with separate share trusts
- 1-208 Will - Bypass & QTIP with GST exempt trusts
- 1-209 Will - Bypass & QTIP with GST exempt & nonexempt trusts

### INDIVIDUAL'S WILLS

- 1-301 Will - Simple
- 1-302 Will - Pourover - short version
- 1-303 Will - Pourover - long version
- 1-304 Will - Family / Pooled Trust
- 1-305 Will - Separate Share Trusts
- 1-306 Will - Separate Share Trusts - GST exempt trusts only
- 1-307 Will - Separate Share GST exempt & nonexempt trusts

### SAME-SEX SPOUSE / DOMESTIC PARTNER #1 WILLS

- 1-401 Will - Simple
- 1-402 Will - Pourover - short version
- 1-403 Will - Pourover - long version
- 1-404 Will - Trust for spouse / partner, then sep share trusts
- 1-405 Will - Separate Share Trusts for one or more benefs

### SAME-SEX SPOUSE / DOMESTIC PARTNER #2 WILLS

- 1-501 Will - Simple
- 1-502 Will - Pourover - short version
- 1-503 Will - Pourover - long version
- 1-504 Will - Trust for spouse / partner, then sep share trusts
- 1-505 Will - Separate Share Trusts for one or more benefs

### CODICILS

- 2-101 Codicil (Husband)
- 2-102 Codicil (Wife)
- 2-103 Codicil (Indiv)
- 2-104 Codicil (Spouse / DP #1)
- 2-105 Codicil (Spouse / DP #2)

## REVOCABLE LIVING TRUSTS

### HUSBAND & WIFE'S JOINT REVOCABLE TRUSTS

- 3-101 Rev Trust - Pourover to Estate of Deceased Settlor
- 3-102 Rev Trust - Simple - outright to benefs
- 3-103 Rev Trust - Simple - with separate share trusts
- 3-104 Rev Trust - Bypass &/or QTIP
- 3-105 Rev Trust - Bypass &/or QTIP with separate share trusts
- 3-106 Rev Trust - Bypass & QTIP with GST exempt trusts
- 3-107 Rev Trust - Bypass & QTIP with GST exempt & nonexempt trusts

### HUSBAND'S REVOCABLE TRUSTS

- 3-201 Rev Trust - Simple - outright to benefs
- 3-202 Rev Trust - Simple - with separate share trusts
- 3-203 Rev Trust - Bypass &/or QTIP
- 3-204 Rev Trust - Bypass &/or QTIP with separate share trusts
- 3-205 Rev Trust - Bypass & QTIP with GST exempt trusts
- 3-206 Rev Trust - Bypass & QTIP with GST exempt & nonexempt trusts

### WIFE'S REVOCABLE TRUSTS

- 3-301 Rev Trust - Simple - outright to benefs
- 3-302 Rev Trust - Simple - with separate share trusts
- 3-303 Rev Trust - Bypass &/or QTIP
- 3-304 Rev Trust - Bypass &/or QTIP with separate share trusts
- 3-305 Rev Trust - Bypass & QTIP with GST exempt trusts
- 3-306 Rev Trust - Bypass & QTIP with GST exempt & nonexempt trusts

### INDIVIDUAL'S REVOCABLE TRUSTS

- 3-401 Rev Trust - Pourover to Estate of Settlor
- 3-402 Rev Trust - Simple - outright to beneficiaries
- 3-403 Rev Trust - Family / Pooled Trust
- 3-404 Rev Trust - Separate Share Trusts

### SAME-SEX SPOUSE / DOMESTIC PARTNER #1 REVOCABLE TRUSTS

- 3-501 Rev Trust - Simple - outright to beneficiaries
- 3-502 Rev Trust - Trust for spouse/partner, then sep share trusts
- 3-503 Rev Trust - Separate Share Trusts for one or more benefs

### SAME-SEX SPOUSE / DOMESTIC PARTNER #2 REVOCABLE TRUSTS

- 3-601 Rev Trust (Spouse / DP#2) - Simple - outright to beneficiaries
- 3-602 Rev Trust (Spouse / DP#2) - Trust for spouse/partner, then sep share trusts
- 3-603 Rev Trust (Spouse / DP#2) - Separate Share Trusts for one or more benefs

### AMENDMENTS TO REVOCABLE TRUSTS

- 4-101 Amendment to Revocable Trust (H&W)
- 4-102 Amendment to Revocable Trust (Husband)
- 4-103 Amendment to Revocable Trust (Wife)
- 4-104 Amendment to Revocable Trust (Indiv)
- 4-105 Amendment to Revocable Trust (Spouse / DP #1)
- 4-106 Amendment to Revocable Trust (Spouse / DP #2)

### REVOICATIONS OF REVOCABLE TRUSTS

- 5-101 Revocation of Revocable Trust (H&W)
- 5-102 Revocation of Revocable Trust (Husband)

- 5-103 Revocation of Revocable Trust (Wife)
- 5-104 Revocation of Revocable Trust (Indiv)
- 5-105 Revocation of Revocable Trust (Spouse / DP #1)
- 5-106 Revocation of Revocable Trust (Spouse / DP #2)

### MISCELLANEOUS REVOCABLE LIVING TRUST FORMS

#### HUSBAND & WIFE'S MISCELLANEOUS REV TRUST FORMS

- 6-101 Memorandum Regarding Funding of Rev Trust
- 6-102 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-103 Certification of Trust (for H&W's Rev Trust)
- 6-104 Letters Regarding Transfer of Accounts
- 6-105 Assignment of Property to Revocable Trust

#### HUSBAND'S MISCELLANEOUS REV TRUST FORMS

- 6-201 Memorandum Regarding Funding of Rev Trust
- 6-202 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-203 Certification of Trust (for Husband's Rev Trust)
- 6-204 Letters Regarding Transfer of Accounts
- 6-205 Assignment of Property to Revocable Trust

#### WIFE'S MISCELLANEOUS REV TRUST FORMS

- 6-301 Memorandum Regarding Funding of Rev Trust
- 6-302 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-303 Certification of Trust (for Wife's Rev Trust)
- 6-304 Letters Regarding Transfer of Accounts
- 6-305 Assignment of Property to Revocable Trust

#### INDIVIDUAL'S MISCELLANEOUS REV TRUST FORMS

- 6-401 Memorandum Regarding Funding of Rev Trust
- 6-402 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-403 Certification of Trust (for Indiv's Rev Trust)
- 6-404 Letters Regarding Transfer of Accounts
- 6-405 Assignment of Property to Revocable Trust

#### SAME-SEX SPOUSE #1 / DOMESTIC PARTNER #1 MISC REV TRUST FORMS

- 6-501 Memorandum Regarding Funding of Rev Trust
- 6-502 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-503 Certification of Trust (for Spouse / DP #1's Rev Trust)
- 6-504 Letters Regarding Transfer of Accounts
- 6-505 Assignment of Property to Revocable Trust

### LIFE INSURANCE TRUSTS

#### SECOND TO DIE LIFE INSURANCE TRUST

- 7-101 Second To Die Life Insurance Trust Agreement
- 7-102 Memorandum Regarding Funding of Trust (for Form 7-101)
- 7-103 Withdrawal Letters (for Form 7-101)
- 7-104 Form to Alter Withdrawal Rights (for Form 7-101)
- 7-105 Letter to Insurance Agent (for Form 7-101)
- 7-106 Certification of Trust (for Form 7-101)

#### WIFE PRIMARY BENEFICIARY LIFE INSURANCE TRUST

- 7-201 Wife Primary Benef Life Ins Trust Agmt - Ins on Husb
- 7-202 Memorandum Regarding Funding of Trust (for Form 7-201)
- 7-203 Withdrawal Letters (for Form 7-201)
- 7-204 Form to Alter Withdrawal Rights (for Form 7-201)
- 7-205 Letter to Insurance Agent (for Form 7-201)
- 7-206 Certification of Trust (for Form 7-201)
- 7-211 Transmutation Agreement for Insurance Policies (for Form 7-201)
- 7-212 Transmutation Agreement for Cash (for Form 7-201)

#### HUSBAND PRIMARY BENEFICIARY LIFE INSURANCE TRUST

- 7-301 Husband Primary Benef Life Ins Trust Agmt - Ins on Wife
- 7-302 Memorandum Regarding Funding of Trust (for Form 7-301)
- 7-303 Withdrawal Letters (for Form 7-301)
- 7-304 Form to Alter Withdrawal Rights (for Form 7-301)
- 7-305 Letter to Insurance Agent (for Form 7-301)
- 7-306 Certification of Trust (for Form 7-301)
- 7-311 Transmutation Agreement for Insurance Policies (for Form 7-301)

- 7-312 Transmutation Agreement for Cash (for Form 7-301)

#### LIFE INSURANCE TRUSTS FOR CHILDREN - INS ON HUSBAND

- 7-401 Life Insurance Trusts For Children - Insurance on Husb
- 7-402 Memorandum Regarding Funding of Trust (for Form 7-401)
- 7-403 Withdrawal Letters (for Form 7-401)
- 7-404 Form to Alter Withdrawal Rights (for Form 7-401)
- 7-405 Letter to Insurance Agent (for Form 7-401)
- 7-406 Certification of Trust (for Form 7-401)

#### LIFE INSURANCE TRUSTS FOR CHILDREN - INSURANCE ON WIFE

- 7-501 Life Insurance Trusts For Children - Insurance on Wife
- 7-502 Memorandum Regarding Funding of Trust (for Form 7-501)
- 7-503 Withdrawal Letters (for Form 7-501)
- 7-504 Form to Alter Withdrawal Rights (for Form 7-501)
- 7-505 Letter to Insurance Agent (for Form 7-501)
- 7-506 Certification of Trust (for Form 7-501)

#### LIFE INSURANCE "SPRINKLE" TRUST

- 7-601 Life Ins "Sprinkle" Trust Agreement - Ins on H&W
- 7-602 Memorandum Regarding Funding of Trust (for Form 7-601)
- 7-603 Withdrawal Letters (for Form 7-601)
- 7-604 Form to Alter Withdrawal Rights (for Form 7-601)
- 7-605 Letter to Insurance Agent (for Form 7-601)
- 7-606 Certification of Trust (for Form 7-601)

#### LIFE INSURANCE TRUSTS FOR CHILDREN - INDIVIDUAL SETTLOR

- 7-701 Life Ins Trusts For Children
- 7-702 Memorandum Regarding Funding of Trust (for Form 7-701)
- 7-703 Withdrawal Letters (for Form 7-701)
- 7-704 Form to Alter Withdrawal Rights (for Form 7-701)
- 7-705 Letter to Insurance Agent (for Form 7-701)
- 7-706 Certification of Trust (for Form 7-701)

#### LIFE INSURANCE "SPRINKLE" TRUST - INDIVIDUAL SETTLOR

- 7-801 Life Ins "Sprinkle" Trust Agreement - Ins on Indiv
- 7-802 Memorandum Regarding Funding of Trust (for Form 7-801)
- 7-803 Withdrawal Letters (for Form 7-801)
- 7-804 Form to Alter Withdrawal Rights (for Form 7-801)
- 7-805 Letter to Insurance Agent (for Form 7-801)
- 7-806 Certification of Trust (for Form 7-801)

### INVESTMENT TRUSTS (IDGT OPTIONAL)

#### SEPARATE INVESTMENT TRUSTS - NO INSURANCE - H&W SETTLORS

- 8-101 Separate Investment Trusts - no insurance
- 8-102 Memorandum Regarding Funding of Trust (for Form 8-101)
- 8-103 Withdrawal Letters (for Form 8-101)
- 8-104 Form to Alter Withdrawal Rights (for Form 8-101)
- 8-105 Certification of Trust (for Form 8-101)

#### INVESTMENT "SPRINKLE" TRUST - NO INSURANCE - H&W SETTLORS

- 8-201 Investment "Sprinkle" Trust Agreement - no insurance
- 8-202 Memorandum Regarding Funding of Trust (for Form 8-201)
- 8-203 Withdrawal Letters (for Form 8-201)
- 8-204 Form to Alter Withdrawal Rights (for Form 8-201)
- 8-205 Certification of Trust (for Form 8-201)

#### SEPARATE INVESTMENT TRUSTS - NO INS - INDIV SETTLOR

- 8-301 Separate Investment Trusts - no insurance
- 8-302 Memorandum Regarding Funding of Trust (for Form 8-301)
- 8-303 Withdrawal Letters (for Form 8-301)
- 8-304 Form to Alter Withdrawal Rights (for Form 8-301)
- 8-305 Certification of Trust (for Form 8-301)

#### INVESTMENT "SPRINKLE" TRUST - NO INS - INDIV SETTLOR

- 8-401 Investment "Sprinkle" Trust Agreement - no insurance
- 8-402 Memorandum Regarding Funding of Trust (for Form 8-401)
- 8-403 Withdrawal Letters (for Form 8-401)
- 8-404 Form to Alter Withdrawal Rights (for Form 8-401)
- 8-405 Certification of Trust (for Form 8-401)

## S CORPORATION TRUSTS

### QUALIFIED S CORPORATION TRUSTS - H&W SETTLORS

- 9-101 Qualified S Corporation Trust Agreement
- 9-102 Memorandum Regarding Funding of Trust (for Form 9-101)
- 9-103 Withdrawal Letters (for Form 9-101)
- 9-104 Form to Alter Withdrawal Rights (for Form 9-101)
- 9-105 Certification of Trust (for Form 9-101)

### QUALIFIED S CORPORATION TRUSTS - INDIV SETTLOR

- 9-201 Qualified S Corporation Trust Agreement
- 9-202 Memorandum Regarding Funding of Trust (for Form 9-201)
- 9-203 Withdrawal Letters (for Form 9-201)
- 9-204 Form to Alter Withdrawal Rights (for Form 9-201)
- 9-205 Certification of Trust (for Form 9-201)

## GRANDCHILDREN'S TRUSTS

### GRANDCHILDREN'S TRUSTS - H&W SETTLORS

- 10-101 Grandchildren's Trust Agreement - GST qualifying
- 10-102 Memorandum Regarding Funding of Trust (for Form 10-101)
- 10-103 Withdrawal Letters (for Form 10-101)
- 10-104 Form to Alter Withdrawal Rights (for Form 10-101)
- 10-105 Certification of Trust (for Form 10-101)

### GRANDCHILDREN'S TRUSTS - INDIV SETTLOR

- 10-201 Grandchildren's Trust Agreement - GST qualifying
- 10-202 Memorandum Regarding Funding of Trust (for Form 10-201)
- 10-203 Withdrawal Letters (for Form 10-201)
- 10-204 Form to Alter Withdrawal Rights (for Form 10-201)
- 10-205 Certification of Trust (for Form 10-201)

## 2503(C) TRUSTS

### 2503(C) TRUST - H&W SETTLORS

- 11-101 2503(c) Trust Agreement
- 11-102 Memorandum Regarding Funding of Trust (for Form 11-101)
- 11-103 Certification of Trust (for Form 11-101)

### 2503(C) TRUST - INDIVIDUAL SETTLOR

- 11-201 2503(c) Trust Agreement
- 11-202 Memorandum Regarding Funding of Trust (for Form 11-201)
- 11-203 Certification of Trust (for Form 11-201)

## QUALIFIED PERSONAL RESIDENCE TRUSTS

### QUALIFIED PERSONAL RESIDENCE TRUST - H&W SETTLORS

- 12-101 Qualified Personal Residence Trust Agreement
- 12-102 Memorandum Regarding Funding of Trust (for Form 12-101)
- 12-103 Certification of Trust (for Form 12-101)

### QUALIFIED PERSONAL RESIDENCE TRUST - HUSBAND SETTLOR

- 12-201 Qualified Personal Residence Trust Agreement
- 12-202 Memorandum Regarding Funding of Trust (for Form 12-201)
- 12-203 Certification of Trust (for Form 12-201)

### QUALIFIED PERSONAL RESIDENCE TRUST - WIFE SETTLOR

- 12-301 Qualified Personal Residence Trust Agreement
- 12-302 Memorandum Regarding Funding of Trust (for Form 12-301)
- 12-303 Certification of Trust (for Form 12-301)

### QUALIFIED PERSONAL RESIDENCE TRUST - INDIV SETTLOR

- 12-401 Qualified Personal Residence Trust Agreement
- 12-402 Memorandum Regarding Funding of Trust (for Form 12-401)
- 12-403 Certification of Trust (for Form 12-401)

## CHARITABLE REMAINDER ANNUITY TRUSTS

### CHARITABLE REMAINDER ANNUITY TRUST - H&W SETTLORS

- 13-101 Charitable Remainder Annuity Trust Agreement
- 13-102 Memorandum Regarding Funding of Trust (for Form 13-101)
- 13-103 Certification of Trust (for Form 13-101)

### CHARITABLE REMAINDER ANNUITY TRUSTS - HUSBAND SETTLOR

- 13-201 Charitable Remainder Annuity Trust Agreement
- 13-202 Memorandum Regarding Funding of Trust (for Form 13-201)
- 13-203 Certification of Trust (for Form 13-201)

### CHARITABLE REMAINDER ANNUITY TRUST - WIFE SETTLOR

- 13-301 Charitable Remainder Annuity Trust Agreement
- 13-302 Memorandum Regarding Funding of Trust (for Form 13-301)
- 13-303 Certification of Trust (for Form 13-301)

### CHARITABLE REMAINDER ANNUITY TRUST - INDIV SETTLOR

- 13-401 Charitable Remainder Annuity Trust Agreement
- 13-402 Memorandum Regarding Funding of Trust (for Form 13-401)
- 13-403 Certification of Trust (for Form 13-401)

## CHARITABLE REMAINDER UNITRUSTS

### CHARITABLE REMAINDER UNITRUST - H&W SETTLORS

- 14-101 Charitable Remainder Unitrust Agreement
- 14-102 Memorandum Regarding Funding of Trust (for Form 14-101)
- 14-103 Certification of Trust (for Form 14-101)

### CHARITABLE REMAINDER UNITRUST - HUSBAND SETTLOR

- 14-201 Charitable Remainder Unitrust Agreement
- 14-202 Memorandum Regarding Funding of Trust (for Form 14-201)
- 14-203 Certification of Trust (for Form 14-201)

### CHARITABLE REMAINDER UNITRUST - WIFE SETTLOR

- 14-301 Charitable Remainder Unitrust Agreement
- 14-302 Memorandum Regarding Funding of Trust (for Form 14-301)
- 14-303 Certification of Trust (for Form 14-301)

### CHARITABLE REMAINDER UNITRUST - INDIV SETTLOR

- 14-401 Charitable Remainder Unitrust Agreement
- 14-402 Memorandum Regarding Funding of Trust (for Form 14-401)
- 14-403 Certification of Trust (for Form 14-401)

## CHARITABLE LEAD TRUSTS

### CHARITABLE LEAD TRUST - H&W SETTLORS

- 15-101 Charitable Lead Trust Agreement
- 15-102 Memorandum Regarding Funding of Trust (for Form 15-101)
- 15-103 Certification of Trust (for Form 15-101)

### CHARITABLE LEAD TRUST - HUSBAND SETTLOR

- 15-201 Charitable Lead Trust Agreement
- 15-202 Memorandum Regarding Funding of Trust (for Form 15-201)
- 15-203 Certification of Trust (for Form 15-201)

### CHARITABLE LEAD TRUST - WIFE SETTLOR

- 15-301 Charitable Lead Trust Agreement
- 15-302 Memorandum Regarding Funding of Trust (for Form 15-301)
- 15-303 Certification of Trust (for Form 15-301)

### CHARITABLE LEAD TRUST - INDIV SETTLOR

- 15-401 Charitable Lead Trust Agreement
- 15-402 Memorandum Regarding Funding of Trust (for Form 15-401)
- 15-403 Certification of Trust (for Form 15-401)

## GRANTOR RETAINED ANNUITY TRUSTS

### GRANTOR RETAINED ANNUITY TRUST - HUSBAND SETTLOR

- 16-101 Grantor Retained Annuity Trust Agreement
- 16-102 Memorandum Regarding Funding of Trust (for Form 16-101)
- 16-103 Certification of Trust (for Form 16-101)

### GRANTOR RETAINED ANNUITY TRUST - WIFE SETTLOR

- 16-201 Grantor Retained Annuity Trust Agreement
- 16-202 Memorandum Regarding Funding of Trust (for Form 16-201)
- 16-203 Certification of Trust (for Form 16-201)

### GRANTOR RETAINED ANNUITY TRUST - INDIV SETTLOR

- 16-301 Grantor Retained Annuity Trust Agreement
- 16-302 Memorandum Regarding Funding of Trust (for Form 16-301)

16-303 Certification of Trust (for Form 16-301)

**GRANTOR RETAINED UNITRUSTS****GRANTOR RETAINED UNITRUST - HUSBAND SETTLOR**

17-101 Grantor Retained Unitrust Agreement  
 17-102 Memorandum Regarding Funding of Trust (for Form 17-101)  
 17-103 Certification of Trust (for Form 17-101)

**GRANTOR RETAINED UNITRUST - WIFE SETTLOR**

17-201 Grantor Retained Unitrust Agreement  
 17-202 Memorandum Regarding Funding of Trust (for Form 17-201)  
 17-203 Certification of Trust (for Form 17-201)

**GRANTOR RETAINED UNITRUST - INDIV SETTLOR**

17-301 Grantor Retained Unitrust Agreement  
 17-302 Memorandum Regarding Funding of Trust (for Form 17-301)  
 17-303 Certification of Trust (for Form 17-301)

**SUPPLEMENTAL NEEDS TRUSTS****SUPPLEMENTAL NEEDS TRUST - H&W SETTLORS**

18-101 Supplemental Needs Trust Agreement  
 18-102 Memorandum Regarding Funding of Trust (for Form 18-101)  
 18-103 Certification of Trust (for Form 18-101)

**SUPPLEMENTAL NEEDS TRUST - HUSBAND SETTLOR**

18-201 Supplemental Needs Trust Agreement  
 18-202 Memorandum Regarding Funding of Trust (for Form 18-201)  
 18-203 Certification of Trust (for Form 18-201)

**SUPPLEMENTAL NEEDS TRUST - WIFE SETTLOR**

18-301 Supplemental Needs Trust Agreement  
 18-302 Memorandum Regarding Funding of Trust (for Form 18-301)  
 18-303 Certification of Trust (for Form 18-301)

**SUPPLEMENTAL NEEDS TRUST - INDIV SETTLOR**

18-401 Supplemental Needs Trust Agreement  
 18-402 Memorandum Regarding Funding of Trust (for Form 18-401)  
 18-403 Certification of Trust (for Form 18-401)

**MISCELLANEOUS FORMS****PRELIMINARY INFORMATION FORMS**

50-101 Preliminary Information (Married clients)  
 50-102 Preliminary Information (Indiv client)  
 50-103 Preliminary Information (Same-sex Spouses / Domestic Partners)

**FACT FINDERS**

51-101 Attorney Fact Finder (Married clients)  
 51-102 Attorney Fact Finder (Indiv client)  
 51-103 Attorney Fact Finder (Same-sex Spouses / Domestic Partners)

**FEE AGREEMENTS**

52-101 Fee Agreement (Married clients)  
 52-102 Fee Agreement (Indiv client)  
 52-103 Fee Agreement (for one Same-sex Spouse / Domestic Partner)  
 52-104 Fee Agreement (for two Same-sex Spouses / Domestic Partners)

**NOTICE REGARDING DOCUMENTS DEPOSITED WITH ATTORNEY**

53-101 Notice Regarding Documents Deposited With Attorney  
 53-102 Notice Regarding Documents Deposited With Attorney  
 53-103 Notice Regarding Documents Deposited With Attorney  
 53-104 Notice Regarding Documents Deposited With Attorney  
 53-105 Notice Regarding Documents Deposited With Attorney

**WILL & CODICIL SIGNING CEREMONY**

54-101 Will & Codicil Signing Ceremony (for Husband & Wife)  
 54-102 Will & Codicil Signing Ceremony (for Indiv)  
 54-103 Will & Codicil Signing Ceremony (for Same-sex Spouse #1 / DP #1)  
 54-104 Will & Codicil Signing Ceremony (for Same-sex Spouse #2 / DP #2)

**MISCELLANEOUS DOCUMENTS****HUSBAND'S MISCELLANEOUS DOCUMENTS**

105-101 Advance Health Care Directive  
 105-102 HIPAA Release  
 105-103 Durable Power of Attorney  
 105-104 Notice to Person Executing Durable Power of Attorney  
 105-105 Notice to Person Accepting Appointment as Agent  
 105-106 Certification of Agent  
 105-107 Affidavit of Physician (that Husband lacks capacity)  
 105-108 California Probate Code Provisions  
 105-109 Revocation of Power of Attorney  
 105-110 Revocation of Advance Health Care Directive  
 105-111 Nomination of Conservator  
 105-112 Nomination of Guardian for Children  
 105-113 Power of Attorney for Care of Minor Child  
 105-114 Memorandum Regarding Personal Belongings  
 105-115 Declaration for Mental Health Treatment  
 105-116 Video Will Checklist

**WIFE'S MISCELLANEOUS DOCUMENTS**

105-201 Advance Health Care Directive  
 105-202 HIPAA Release  
 105-203 Durable Power of Attorney  
 105-204 Notice to Person Executing Durable Power of Attorney  
 105-205 Notice to Person Accepting Appointment as Agent  
 105-206 Certification of Agent  
 105-207 Affidavit of Physician (that Wife lacks capacity)  
 105-208 California Probate Code Provisions  
 105-209 Revocation of Power of Attorney  
 105-210 Revocation of Advance Health Care Directive  
 105-211 Nomination of Conservator  
 105-212 Nomination of Guardian for Children  
 105-213 Power of Attorney for Care of Minor Child  
 105-214 Memorandum Regarding Personal Belongings  
 105-215 Declaration for Mental Health Treatment  
 105-216 Video Will Checklist

**INDIVIDUAL'S MISCELLANEOUS DOCUMENTS**

105-301 Advance Health Care Directive  
 105-302 HIPAA Release  
 105-303 Durable Power of Attorney  
 105-304 Notice to Person Executing Durable Power of Attorney  
 105-305 Notice to Person Accepting Appointment as Agent  
 105-306 Certification of Agent  
 105-307 Affidavit of Physician (that Indiv lacks capacity)  
 105-308 California Probate Code Provisions  
 105-309 Revocation of Power of Attorney  
 105-310 Revocation of Advance Health Care Directive  
 105-311 Nomination of Conservator  
 105-312 Nomination of Guardian for Children  
 105-313 Power of Attorney for Care of Minor Child  
 105-314 Memorandum Regarding Personal Belongings  
 105-315 Declaration for Mental Health Treatment  
 105-316 Video Will Checklist

**SAME-SEX SPOUSE / DOMESTIC PARTNER #1 MISC DOCS**

105-401 Advance Health Care Directive  
 105-402 HIPAA Release  
 105-403 Durable Power of Attorney  
 105-404 Notice to Person Executing Durable Power of Attorney  
 105-405 Notice to Person Accepting Appointment as Agent  
 105-406 Certification of Agent  
 105-407 Affidavit of Physician (that Spouse / DP #1 lacks capacity)  
 105-408 California Probate Code Provisions  
 105-409 Revocation of Power of Attorney  
 105-410 Revocation of Advance Health Care Directive  
 105-411 Nomination of Conservator

105-412 Nomination of Guardian for Children  
 105-413 Power of Attorney for Care of Minor Child  
 105-414 Memorandum Regarding Personal Belongings  
 105-415 Declaration for Mental Health Treatment  
 105-416 Video Will Checklist

#### **SAME-SEX SPOUSE / DOMESTIC PARTNER #2 MISC DOCS**

105-501 Advance Health Care Directive  
 105-502 HIPAA Release  
 105-503 Durable Power of Attorney  
 105-504 Notice to Person Executing Durable Power of Attorney  
 105-505 Notice to Person Accepting Appointment as Agent  
 105-506 Certification of Agent  
 105-507 Affidavit of Physician (that Spouse / DP #2 lacks capacity)  
 105-508 California Probate Code Provisions  
 105-509 Revocation of Power of Attorney  
 105-510 Revocation of Advance Health Care Directive  
 105-511 Nomination of Conservator  
 105-512 Nomination of Guardian for Children  
 105-513 Power of Attorney for Care of Minor Child  
 105-514 Memorandum Regarding Personal Belongings  
 105-515 Declaration for Mental Health Treatment  
 105-516 Video Will Checklist

#### **DEEDS**

105-601 Deed - Transfer to Husband and Wife's Joint Revocable Trust  
 105-602 Deed - Transfer half to H's Rev Trust & half to W's Rev Trust  
 105-603 Deed - Transfer to Husband's Revocable Trust  
 105-604 Deed - Transfer to Wife's Revocable Trust  
 105-605 Deed - Transfer to Individual's Revocable Trust

105-606 Deed - Transfer to Spouse / DP #1's Rev Trust  
 105-607 Deed - Transfer to Spouse / DP #2's Rev Trust  
 105-608 Deed - Transfer to Husband and Wife's QPRT  
 105-609 Deed - Transfer half to H's QPRT & half to W's QPRT  
 105-610 Deed - Transfer to Husband's QPRT  
 105-611 Deed - Transfer to Wife's QPRT  
 105-612 Deed - Transfer to Individual's QPRT

#### **MARITAL PROPERTY AGREEMENTS**

105-701 Post-marital Property Agreements and specified assets  
 105-702 Voluntary Waiver of Further Disclosure (for use with Form 105-601)  
 105-703 Agreement to Transmute Sep Prop to Community Prop

#### **BUY SELL AGREEMENTS**

105-801 Wait and See Buy Sell Agreement  
 105-802 Cross Purchase Buy Sell Agreement  
 105-803 Stock Redemption Buy Sell Agreement

#### **MISCELLANEOUS LETTERS & FORMS**

##### **TRUST ADMINISTRATION DOCUMENTS**

105-901 Affidavit of Change of Trustee

##### **TRANSMITTAL LETTERS**

200-101 Letter Sent with Drafts  
 200-102 Letter Sent with Signed Originals

##### **LETTERS REGARDING NEW TAX LAWS**

200-201 Letter to client regarding 2010 Tax Act - Long Version  
 200-202 Letter to client regarding 2010 Tax Act - Short Version