

This volume provides a complete small estate package for a general practitioner providing legal services to a husband, wife, individual, or domestic partner. Whether you draft wills as a normal part of your practice or you offer them as a value-added service for clients, you will find this volume extraordinarily useful. It contains more than 90 automated forms you need to represent clients with uncomplicated estates—generally those not subject to the federal estate tax.

1-1 Case Profile

## DOMESTIC PARTNERSHIPS

### HUSBAND'S ESTATE PLANNING DOCUMENTS

- 1-01 Simple Will (Husband)
- 1-02 Trust Will (Husband)
- 1-03 Pour-over Will (Husband)
- 1-04 Durable Power of Attorney (Husband)
- 1-05 Modification of Power of Attorney (Husband)
- 1-06 Revocation of Power of Attorney (Husband)
- 1-07 Physician's Declaration (Husband)
- 1-08 Advance Health Care Directive (Husband)
- 1-09 HIPAA Release (Husband)
- 1-10 Revocation of Advance Health Care Directive (Husband)
- 1-11 Uniform Donor Card (Husband)
- 1-12 Separate Writing for Tangible Personal Property (Husband)
- 1-13 Revocable Trust Declaration-Agreement (Husband)
- 1-14 Codicil (Husband)
- 1-15 Written Revocation of Will (Husband)

### WIFE'S ESTATE PLANNING DOCUMENTS

- 2-01 Simple Will (Wife)
- 2-02 Trust Will (Wife)
- 2-03 Pour-over Will (Wife)
- 2-04 Durable Power of Attorney (Wife)
- 2-05 Modification of Power of Attorney (Wife)
- 2-06 Revocation of Power of Attorney (Wife)
- 2-07 Physician's Declaration (Wife)
- 2-08 Advance Health Care Directive (Wife)
- 2-09 HIPAA Release (Wife)
- 2-10 Revocation of Advance Health Care Directive (Wife)
- 2-11 Uniform Donor Card (Wife)
- 2-12 Separate Writing for Tangible Personal Property (Wife)
- 2-13 Revocable Trust Declaration-Agreement (Wife)
- 2-14 Codicil (Wife)
- 2-15 Written Revocation of Will (Wife)

### INDIVIDUAL'S ESTATE PLANNING DOCUMENTS

- 3-01 Simple Will (Individual)
- 3-02 Trust Will (Individual)
- 3-03 Pour-over Will (Individual)
- 3-04 Durable Power of Attorney (Individual)
- 3-05 Modification of Power of Attorney (Individual)
- 3-06 Revocation of Power of Attorney (Individual)
- 3-07 Physician's Declaration (Individual)
- 3-08 Advance Health Care Directive (Individual)
- 3-09 HIPAA Release (Individual)
- 3-10 Revocation of Advance Health Care Directive (Individual)
- 3-11 Uniform Donor Card (Individual)
- 3-12 Separate Writing for Tangible Personal Property (Individual)
- 3-13 Revocable Trust Declaration-Agreement (Individual)
- 3-14 Codicil (Individual)
- 3-15 Written Revocation of Will (Individual)

### CREATING/TERMINATING A DOMESTIC PARTNERSHIP

- 4-01 Declaration of Domestic Partnership
- 4-02 Notice of Termination of Domestic Partnership
- 4-03 Revocation of Termination of Domestic Partnership
- 4-04 Pre-partnership Property Agreement

### ESTATE PLANNING DOCUMENTS OF DOMESTIC PARTNER A

- 5-01 Simple Will (Domestic Partner A)
- 5-02 Trust Will (Domestic Partner A)
- 5-03 Pour-over Will (Domestic Partner A)
- 5-04 Durable Power of Attorney (Domestic Partner A)
- 5-05 Modification of Power of Attorney (Domestic Partner A)
- 5-06 Revocation of Power of Attorney (Domestic Partner A)
- 5-07 Physician's Declaration (Domestic Partner A)
- 5-08 Advance Health Care Directive (Domestic Partner A)
- 5-09 HIPAA Release (Domestic Partner A)
- 5-10 Revocation of Advance Health Care Directive (Domestic Partner A)
- 5-11 Uniform Donor Card (Domestic Partner A)
- 5-12 Separate Writing for Tangible Personal Property (Domestic Partner A)
- 5-13 Revocable Trust Declaration-Agreement (Domestic Partner A)
- 5-14 Codicil (Domestic Partner A)
- 5-15 Written Revocation of Will (Domestic Partner A)

### ESTATE PLANNING DOCUMENTS OF DOMESTIC PARTNER B

- 6-01 Simple Will (Domestic Partner B)
- 6-02 Trust Will (Domestic Partner B)
- 6-03 Pour-over Will (Domestic Partner B)
- 6-04 Durable Power of Attorney (Domestic Partner B)
- 6-05 Modification of Power of Attorney (Domestic Partner B)
- 6-06 Revocation of Power of Attorney (Domestic Partner B)
- 6-07 Physician's Declaration (Domestic Partner B)
- 6-08 Advance Health Care Directive (Domestic Partner B)
- 6-09 HIPAA Release (Domestic Partner B)
- 6-10 Revocation of Advance Health Care Directive (Domestic Partner B)
- 6-11 Uniform Donor Card (Domestic Partner B)
- 6-12 Separate Writing for Tangible Personal Property (Domestic Partner B)
- 6-13 Revocable Trust Declaration-Agreement (Domestic Partner B)
- 6-14 Codicil (Domestic Partner B)
- 6-15 Written Revocation of Will (Domestic Partner B)

### MINOR CHILDREN'S DOCUMENTS

- 7-01 Medical Power of Attorney (Minor Dependent Child)
- 7-02 HIPAA Release (Minor Dependent Child)
- 7-03 Revocation of Medical Power of Attorney (Minor Dependent Child)

### MISCELLANEOUS DOCUMENTS

- 8-01 Consent to Concurrent Representation
- 8-02 Client Questionnaire (Long Form)
- 8-03 Client Questionnaire (Short Form)

**LOCAL FORMS**

**KERN COUNTY**

- 114-100 Power of Attorney - General
- 114-105 Power of Attorney - Limited

**LOS ANGELES COUNTY**

- 118-101 Notice of Deposit of Estate Planning Docs and Acknowledgment

**RIVERSIDE COUNTY**

- 132-100 Power of Attorney - General
- 132-105 Power of Attorney - Revocation
- 132-110 Receipt for Will

**SAN BERNARDINO COUNTY**

- 135-100 Power of Attorney - General

**SAN DIEGO COUNTY**

- 136-100 Notice of Transfer of Estate Planning Documents

**SAN JOAQUIN COUNTY**

- 138-100 Notice of Transfer of Estate Planning Documents to Clerk