

The more than 432 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, living wills, directives to physicians, irrevocable trusts, buy-sell agreements, and even pre- & post-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 - Simple - outright to beneficiaries
- 3-602 Rev Trust - Trust for spouse/partner, then sep share trusts
- 3-603 Rev Trust - 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)

REVOCATIONS 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 Husband
 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)

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)

LIFE INSURANCE TRUSTS FOR CHILDREN - INS ON HUSBAND

7-401 Life Insurance Trusts For Children - Insurance on Husband
 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)

QUALIFIED INCOME ("MILLER" OR "(D)(4)(B)") TRUST

- 19-101 Qualified Income ("Miller") Trust Agreement
 19-102 Memorandum Regarding Funding of Trust (for Form 19-101)
 19-103 Letter from Attorney to Bank (for Form 19-101)

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**

- 110-101 Designation of Health Care Surrogate
 110-102 HIPAA Release

- 110-103 Living Will
 110-104 Combo Living Will & Health Care Surrogate
 110-105 Durable Power of Attorney
 110-106 Notice to Person Executing Power of Attorney
 110-107 Notice to Person Accepting Appointment as Agent
 110-108 Affidavit of Agent
 110-109 Affidavit of Physician (that Husband lacks capacity)
 110-110 Revocation of Power of Attorney
 110-111 Revocation of Designation of Health Care Surrogate
 110-112 Declaration Naming Preneed Guardian
 110-113 Nomination of Guardian for Children
 110-114 Power of Attorney for Care of Minor Child
 110-115 Separate Writing Memorandum
 110-116 Declaration for Mental Health Treatment
 110-117 Appointment of Agent to Dispose of Remains
 110-118 Form to Donate Body for Medical Study
 110-119 Uniform Donor Card
 110-120 Video Will Checklist

WIFE'S MISCELLANEOUS DOCUMENTS

- 110-201 Designation of Health Care Surrogate
 110-202 HIPAA Release
 110-203 Living Will
 110-204 Combo Living Will & Health Care Surrogate
 110-205 Durable Power of Attorney
 110-206 Notice to Person Executing Power of Attorney
 110-207 Notice to Person Accepting Appointment as Agent
 110-208 Affidavit of Agent
 110-209 Affidavit of Physician (that Wife lacks capacity)
 110-210 Revocation of Power of Attorney
 110-211 Revocation of Designation of Health Care Surrogate
 110-212 Declaration Naming Preneed Guardian
 110-213 Nomination of Guardian for Children
 110-214 Power of Attorney for Care of Minor Child
 110-215 Separate Writing Memorandum
 110-216 Declaration for Mental Health Treatment
 110-217 Appointment of Agent to Dispose of Remains
 110-218 Form to Donate Body for Medical Study
 110-219 Uniform Donor Card
 110-220 Video Will Checklist

INDIVIDUAL'S MISCELLANEOUS DOCUMENTS

- 110-301 Designation of Health Care Surrogate
 110-302 HIPAA Release
 110-303 Living Will
 110-304 Combo Living Will & Health Care Surrogate
 110-305 Durable Power of Attorney
 110-306 Notice to Person Executing Power of Attorney
 110-307 Notice to Person Accepting Appointment as Agent
 110-308 Affidavit of Agent
 110-309 Affidavit of Physician (that Indiv lacks capacity)
 110-310 Revocation of Power of Attorney
 110-311 Revocation of Designation of Health Care Surrogate
 110-312 Declaration Naming Preneed Guardian
 110-313 Nomination of Guardian for Children
 110-314 Power of Attorney for Care of Minor Child
 110-315 Separate Writing Memorandum
 110-316 Declaration for Mental Health Treatment
 110-317 Appointment of Agent to Dispose of Remains
 110-318 Form to Donate Body for Medical Study
 110-319 Uniform Donor Card
 110-320 Video Will Checklist

SAME-SEX SPOUSE / DOMESTIC PARTNER #1 MISC DOCS

- 110-401 Designation of Health Care Surrogate
 110-402 HIPAA Release
 110-403 Living Will
 110-404 Combo Living Will & Health Care Surrogate

- 110-405 Durable Power of Attorney
- 110-406 Notice to Person Executing Power of Attorney
- 110-407 Notice to Person Accepting Appointment as Agent
- 110-408 Affidavit of Agent
- 110-409 Affidavit of Physician (that Spouse / DP #1 lacks capacity)
- 110-410 Revocation of Power of Attorney
- 110-411 Revocation of Designation of Health Care Surrogate
- 110-412 Declaration Naming Preneed Guardian
- 110-413 Nomination of Guardian for Children
- 110-414 Power of Attorney for Care of Minor Child
- 110-415 Separate Writing Memorandum
- 110-416 Declaration for Mental Health Treatment
- 110-417 Appointment of Agent to Dispose of Remains
- 110-418 Form to Donate Body for Medical Study
- 110-419 Uniform Donor Card
- 110-420 Video Will Checklist

SAME-SEX SPOUSE / DOMESTIC PARTNER #2 MISC DOCS

- 110-501 Designation of Health Care Surrogate
- 110-502 HIPAA Release
- 110-503 Living Will
- 110-504 Combo Living Will & Health Care Surrogate
- 110-505 Durable Power of Attorney
- 110-506 Notice to Person Executing Power of Attorney
- 110-507 Notice to Person Accepting Appointment as Agent
- 110-508 Affidavit of Agent
- 110-509 Affidavit of Physician (that Spouse / DP #2 lacks capacity)
- 110-510 Revocation of Power of Attorney
- 110-511 Revocation of Designation of Health Care Surrogate
- 110-512 Declaration Naming Preneed Guardian
- 110-513 Nomination of Guardian for Children
- 110-514 Power of Attorney for Care of Minor Child
- 110-515 Separate Writing Memorandum
- 110-516 Declaration for Mental Health Treatment
- 110-517 Appointment of Agent to Dispose of Remains
- 110-518 Form to Donate Body for Medical Study
- 110-519 Uniform Donor Card
- 110-520 Video Will Checklist

DEEDS

- 110-601 Deed - Transfer to Husband and Wife's Joint Revocable Trust
- 110-602 Deed - Transfer half to H's Rev Trust & half to W's Rev Trust
- 110-603 Deed - Transfer to Husband's Revocable Trust
- 110-604 Deed - Transfer to Wife's Revocable Trust
- 110-605 Deed - Transfer to Individual's Revocable Trust

- 110-606 Deed - Transfer to Spouse / DP #1's Rev Trust
- 110-607 Deed - Transfer to Spouse / DP #2's Rev Trust
- 110-608 Deed - Transfer to Husband and Wife's QPRT
- 110-609 Deed - Transfer half to H's QPRT & half to W's QPRT
- 110-610 Deed - Transfer to Husband's QPRT
- 110-611 Deed - Transfer to Wife's QPRT
- 110-612 Deed - Transfer to Individual's QPRT

FAMILY LIMITED PARTNERSHIP

- 110-701 Agreement of Limited Partnership
- 110-702 Certificate of Limited Partnership
- 110-703 Assignment of Limited Partner Interest
- 110-704 Subscription Agreement
- 110-705 Memorandum Regarding Administration of FLP

MARITAL PROPERTY AGREEMENTS

PREMARITAL PROPERTY AGREEMENT

- 110-801 Premarital Agreement
- 110-802 Premarital Agreement Attorney Checklist (for use with Form 110-701)
- 110-803 Voluntary Waiver of Further Disclosure (for use with Form 110-701)
- 110-804 Reaffirmation of Premarital Agreement (for use with 110-701)

POST-MARITAL PROPERTY AGREEMENT - COMPREHENSIVE

- 110-901 Post-marital Property Agreement - comprehensive
- 110-902 Post-marital Agreement Attorney Checklist (for use with Form 110-801)

BUY SELL AGREEMENTS

- 110-1001 Wait and See Buy Sell Agreement
- 110-1002 Cross Purchase Buy Sell Agreement
- 110-1003 Stock Redemption Buy Sell Agreement

MISCELLANEOUS LETTERS & FORMS

ANSWERS TO FREQUENTLY ASKED QUESTIONS

- 110-1101 Answers to Frequently Asked Questions

TRUST ADMINISTRATION DOCUMENTS

- 110-1201 Affidavit of Successor 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