

SMALL ESTATE WILLS

With over 50 automated forms, the Small Estate Wills volume is designed specifically to meet the needs of clients with smaller estates generally those that do not require sophisticated tax planning. The volume includes forms for Wills, Revocable Living Trusts, Durable Powers of Attorney, Living Wills, Health Care Proxies, HIPAA Releases, and more.

CLIENT INTAKE

Client Information Form
Consent to Joint Representation

LETTERS

Letter to Client - Confirming Initial Conference
Letter to Client - Transmitting Drafts of Estate Planning Documents
Letter to Client - Confirming Conference to Execute Documents
Letter to Client - Transmitting Original or Copy of Executed Documents
Letter to Individual Trustee - Transmitting Copy of Executed Documents
Closing Agenda

SPOUSE A'S ESTATE PLANNING DOCUMENTS

Simple Will - Spouse A
Pour-over Will - Spouse A
Revocable Living Trust - Spouse A
Trustee's Certificate - Spouse A
Codicil to Last Will and Testament - Spouse A
Durable Power of Attorney - General - Spouse A
Durable Power of Attorney - Limited - Spouse A
Revocation of Power of Attorney - Spouse A
Health Care Proxy - Spouse A
Revocation of Health Care Proxy - Spouse A
HIPAA Release - Spouse A
Document of Anatomical Gift - Spouse A
Living Will - Spouse A
Life Insurance Beneficiary Form - Spouse A

SPOUSE B'S ESTATE PLANNING DOCUMENTS

Simple Will - Spouse B
Pour-over Will - Spouse B
Revocable Living Trust - Spouse B
Trustee's Certificate - Spouse B
Codicil to Last Will and Testament - Spouse B
Durable Power of Attorney - General - Spouse B
Durable Power of Attorney - Limited - Spouse B
Revocation of Power of Attorney - Spouse B
Health Care Proxy - Spouse B
Revocation of Health Care Proxy - Spouse B
HIPAA Release - Spouse B
Document of Anatomical Gift - Spouse B
Living Will - Spouse B
Life Insurance Beneficiary Form - Spouse B

JOINT GRANTORS' TRUST DOCUMENTS

Revocable Living Trust - Joint Grantors
Trustee's Certificate - Joint Grantors

INDIVIDUAL'S ESTATE PLANNING DOCUMENTS

Simple Will - Individual
Pour-over Will - Individual
Revocable Living Trust - Individual
Trustee's Certificate - Individual

Codicil to Last Will and Testament - Individual
Durable Power of Attorney - General - Individual
Durable Power of Attorney - Limited - Individual
Revocation of Power of Attorney - Individual
Health Care Proxy - Individual
Revocation of Health Care Proxy - Individual
HIPAA Release - Individual
Document of Anatomical Gift - Individual
Living Will - Individual
Life Insurance Beneficiary Form - Individual

MINOR CHILDREN DOCUMENTS

Health Care Proxy - Minor
HIPAA Release - Minor
Appointment of Temporary Agent for Care - Minor
Appointment of Guardian - Minor

NOMINEE TRUST DOCUMENTS

Declaration of Trust Establishing Nominee Trust (REBA No 20)
Nominee Trust Schedule of Beneficiaries (REBA No 20A)
Receipt of Schedule of Beneficiaries (REBA No 20B)
Nominee Trust Resignation (REBA No 20C)
Nominee Trust Appointment of Successor Trustee (REBA No 20D)
Certificate of Acceptance by Trustee (REBA No 20E)
Nominee Trust Certificate of Appointment of Successor Trustee (REBA No 20F)
Trustee Certificate (REBA No 20G)
Certificate and Direction Of Beneficiary (REBA No 20H)