

The more than 490 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, health care proxies, HIPAA releases, living wills, irrevocable trusts, buy-sell agreements, and even pre-marital & 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 (Spouse / DP#1) - Simple - outright to beneficiaries
- 3-502 Rev Trust (Spouse / DP#1) - Trust for spouse/partner, then sep share trusts
- 3-503 Rev Trust (Spouse / DP#1) - 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 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
 6-106 Bill of Sale

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
 6-206 Bill of Sale

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
 6-306 Bill of Sale

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
 6-406 Bill of Sale

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
 6-506 Bill of Sale

SAME-SEX SPOUSE #2 / DOMESTIC PARTNER #2 MISC REV TRUST FORMS

6-601 Memorandum Regarding Funding of Rev Trust
 6-602 Letter to Lender Re. Transfer of Account to Rev Trust
 6-603 Certification of Trust (for Spouse / DP #2's Rev Trust)
 6-604 Letters Regarding Transfer of Accounts
 6-605 Assignment of Property to Revocable Trust
 6-606 Bill of Sale

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)

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 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)

QUALIFIED 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**

- 133-101 Health Care Proxy
 133-102 HIPAA Release
 133-103 Living Will
 133-104 Statutory Short Form Power of Attorney
 133-105 Notice to Person Executing Power of Attorney
 133-106 Certification of Agent
 133-107 Affidavit of Physician (that Husband lacks capacity)
 133-108 New York General Obligations Law Provisions
 133-109 Revocation of Power of Attorney
 133-110 Revocation of Health Care Proxy
 133-111 Nomination of Guardian
 133-112 Nomination of Guardian for Children
 133-113 Designation of Standby Guardian for Minor Child
 133-114 Designation of Person in Parental Relation
 133-115 Memorandum Regarding Personal Belongings
 133-116 Declaration for Mental Health Treatment
 133-117 Appointment of Agent to Dispose of Remains
 133-118 Form to Donate Body for Medical Study
 133-119 Disclosure Regarding Commissions
 133-120 Putnam Affidavit
 133-121 General Waiver of Election to Take Against Will
 133-122 Limited Waiver of Election to Take Against Will
 133-123 Organ Donor Card
 133-124 Video Will Checklist

WIFE'S MISCELLANEOUS DOCUMENTS

- 133-201 Health Care Proxy
 133-202 HIPAA Release
 133-203 Living Will
 133-204 Statutory Short Form Power of Attorney
 133-205 Notice to Person Executing Power of Attorney
 133-206 Certification of Agent
 133-207 Affidavit of Physician (that Wife lacks capacity)
 133-208 New York General Obligations Law Provisions
 133-209 Revocation of Power of Attorney
 133-210 Revocation of Health Care Proxy
 133-211 Nomination of Guardian
 133-212 Nomination of Guardian for Children
 133-213 Designation of Standby Guardian for Minor Child
 133-214 Designation of Person in Parental Relation
 133-215 Memorandum Regarding Personal Belongings
 133-216 Declaration for Mental Health Treatment
 133-217 Appointment of Agent to Dispose of Remains
 133-218 Form to Donate Body for Medical Study
 133-219 Disclosure Regarding Commissions
 133-220 Putnam Affidavit
 133-221 General Waiver of Election to Take Against Will
 133-222 Limited Waiver of Election to Take Against Will
 133-223 Organ Donor Card
 133-224 Video Will Checklist

INDIVIDUAL'S MISCELLANEOUS DOCUMENTS

- 133-301 Health Care Proxy
 133-302 HIPAA Release
 133-303 Living Will
 133-304 Statutory Short Form Power of Attorney
 133-305 Notice to Person Executing Power of Attorney
 133-306 Certification of Agent
 133-307 Affidavit of Physician (that Indiv lacks capacity)

133-308 New York General Obligations Law Provisions
 133-309 Revocation of Power of Attorney
 133-310 Revocation of Health Care Proxy
 133-311 Nomination of Guardian
 133-312 Nomination of Guardian for Children
 133-313 Designation of Standby Guardian for Minor Child
 133-314 Designation of Person in Parental Relation
 133-315 Memorandum Regarding Personal Belongings
 133-316 Declaration for Mental Health Treatment
 133-317 Appointment of Agent to Dispose of Remains
 133-318 Form to Donate Body for Medical Study
 133-319 Disclosure Regarding Commissions
 133-320 Putnam Affidavit
 133-321 Organ Donor Card
 133-322 Video Will Checklist

SAME-SEX SPOUSE / DOMESTIC PARTNER #1 MISC DOCS

133-401 Health Care Proxy
 133-402 HIPAA Release
 133-403 Living Will
 133-404 Statutory Short Form Power of Attorney
 133-405 Notice to Person Executing Power of Attorney
 133-406 Certification of Agent
 133-407 Affidavit of Physician (that Spouse / DP #1 lacks capacity)
 133-408 New York General Obligations Law Provisions
 133-409 Revocation of Power of Attorney
 133-410 Revocation of Health Care Proxy
 133-411 Nomination of Guardian
 133-412 Nomination of Guardian for Children
 133-413 Designation of Standby Guardian for Minor Child
 133-414 Designation of Person in Parental Relation
 133-415 Memorandum Regarding Personal Belongings
 133-416 Declaration for Mental Health Treatment
 133-417 Appointment of Agent to Dispose of Remains
 133-418 Form to Donate Body for Medical Study
 133-419 Disclosure Regarding Commissions
 133-420 Putnam Affidavit
 133-421 Organ Donor Card
 133-422 Video Will Checklist

SAME-SEX SPOUSE / DOMESTIC PARTNER #2 MISC DOCS

133-501 Health Care Proxy
 133-502 HIPAA Release
 133-503 Living Will
 133-504 Statutory Short Form Power of Attorney
 133-505 Notice to Person Executing Power of Attorney
 133-506 Certification of Agent
 133-507 Affidavit of Physician (that Spouse / DP #2 lacks capacity)
 133-508 New York General Obligations Law Provisions
 133-509 Revocation of Power of Attorney
 133-510 Revocation of Health Care Proxy
 133-511 Nomination of Guardian

133-512 Nomination of Guardian for Children
 133-513 Designation of Standby Guardian for Minor Child
 133-514 Designation of Person in Parental Relation
 133-515 Memorandum Regarding Personal Belongings
 133-516 Declaration for Mental Health Treatment
 133-517 Appointment of Agent to Dispose of Remains
 133-518 Form to Donate Body for Medical Study
 133-519 Disclosure Regarding Commissions
 133-520 Putnam Affidavit
 133-521 Organ Donor Card
 133-522 Video Will Checklist

DEEDS

133-601 Deed - Transfer to Husband and Wife's Joint Revocable Trust
 133-602 Deed - Transfer half to H's Rev Trust & half to W's Rev Trust
 133-603 Deed - Transfer to Husband's Revocable Trust
 133-604 Deed - Transfer to Wife's Revocable Trust
 133-605 Deed - Transfer to Individual's Revocable Trust
 133-606 Deed - Transfer to Spouse / DP #1's Rev Trust
 133-607 Deed - Transfer to Spouse / DP #2's Rev Trust
 133-608 Deed - Transfer to Husband and Wife's QPRT
 133-609 Deed - Transfer half to H's QPRT & half to W's QPRT
 133-610 Deed - Transfer to Husband's QPRT
 133-611 Deed - Transfer to Wife's QPRT
 133-612 Deed - Transfer to Individual's QPRT

MARITAL PROPERTY AGREEMENTS

PRE-MARITAL PROPERTY AGREEMENT

133-701 Pre-marital Agreement
 133-702 Pre-marital Agreement Attorney Checklist (for use with Form 133-601)
 133-703 Reaffirmation of Premarital Agreement (for use with Form 133-601)

POST-MARITAL PROPERTY AGREEMENT

133-801 Post-marital Agreement
 133-802 Post-marital Agreement Attorney Checklist (for use with Form 133-701)

BUY SELL AGREEMENTS

133-901 Wait and See Buy Sell Agreement
 133-902 Cross Purchase Buy Sell Agreement
 133-903 Stock Redemption Buy Sell Agreement

MISCELLANEOUS LETTERS & FORMS

TRUST ADMINISTRATION DOCUMENTS

133-1001 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