

This volume comprises more than 40 automated forms representing basic estate planning documents – wills, directives to physicians, living trusts, and general and medical powers of attorney. The volume contains the forms you need to represent clients with uncomplicated estates – generally those not subject to the federal estate tax.

MAN'S ESTATE PLANNING DOCUMENTS

- 1-01 Will (with pourover option for living trust)
- 1-06 Statutory Durable Power of Attorney--Man (Short Form)
- 1-10 Durable General Power of Attorney--Man (Long Form)
- 1-15 Medical Power of Attorney
- 1-17 HIPAA Release
- 1-20 Directive to Physician
- 1-25 Codicil to Last Will and Testament
- 1-30 Gift by a Living Donor Exhibit
- 1-35 Revocation of Powers of Attorney
- 1-40 Video Will Checklist
- 1-42 Declaration of Guardian
- 1-45 Declaration for Mental Health Treatment
- 1-50 Declaration of Appointment of Guardian for My Child
- 1-55 Appointment of Agent to Control Disposition of Remains

WOMAN'S ESTATE PLANNING DOCUMENTS

- 2-01 Will (with pourover option for living trust)
- 2-06 Statutory Durable Power of Attorney
- 2-10 Durable General Power of Attorney--Woman's Long Form
- 2-15 Medical Power of Attorney
- 2-17 HIPAA Release
- 2-20 Directive to Physician
- 2-25 Codicil to Last Will and Testament
- 2-30 Gift by a Living Donor Exhibit
- 2-35 Revocation of Powers of Attorney
- 2-40 Video Will Checklist
- 2-42 Declaration of Guardian
- 2-45 Declaration for Mental Health Treatment
- 2-50 Declaration of Appointment of Guardian for My Child
- 2-55 Appointment of Agent to Control Disposition of Remains

GENERAL ESTATE PLANNING DOCUMENTS

- 3-01 Mutual Consent Agreement
- 3-05 Client Information Worksheet

CHILDREN'S DOCUMENTS

- 4-05 Medical Power of Attorney - Minor Dependent Child
- 4-17 HIPAA Release - Minor Dependent Child

LIVING TRUSTS & ANCILLARY DOCUMENTS

- 6-02 Revocable Living Trust for Married Settlor (Joint)
- 6-03 Designation and Authorization of Successor Trustees (Joint)
- 6-04 Letter to Transfer Securities for Married Settlor (Joint)
- 6-12 Revocable Living Trust for One Settlor
- 6-13 Designation and Authorization of Successor Trustees
- 6-14 Letter to Transfer Securities
- 6-22 Revocable Living Trust for One Settlor
- 6-23 Designation and Authorization of Successor Trustees
- 6-24 Letter to Transfer Securities