

The more than 465 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, medical powers of attorney, HIPAA releases, 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 (H&W) - Pourover to Estate of Deceased Settlor
- 3-102 Rev Trust (H&W) - Simple - outright to benefs
- 3-103 Rev Trust (H&W) - Simple - with separate share trusts
- 3-104 Rev Trust (H&W) - Bypass &/or QTIP
- 3-105 Rev Trust (H&W) - Bypass &/or QTIP with separate share trusts
- 3-106 Rev Trust (H&W) - Bypass & QTIP with GST exempt trusts
- 3-107 Rev Trust (H&W) - 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)

### 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 (H&W)  
 6-102 Letter to Lender Re. Transfer of Account to Rev Trust (H&W)  
 6-103 Certification of Trust (for H&W's Rev Trust)  
 6-104 Letters Regarding Transfer of Accounts (H&W)  
 6-105 Assignment of Property to Revocable Trust (H&W)

#### 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 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)  
 7-207 Partition Agreement for Insurance Policies (for Form 7-201)  
 7-208 Partition Agreement for Cash (for Form 7-201)  
 7-209 Release of Community Property Interest - Ins Policies (for Form 7-201)  
 7-210 Release of Community Property Interest - Cash (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)  
 7-307 Partition Agreement for Insurance Policies (for Form 7-301)  
 7-308 Partition Agreement for Cash (for Form 7-301)

- 7-309 Release of Community Property Interest - Ins Policies (for Form 7-301)  
 7-310 Release of Community Property Interest - Cash (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)

### **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

144-101 Medical Power of Attorney  
144-102 HIPAA Release  
144-103 Directive to Physicians  
144-104 Combo Directive to Physicians & Medical POA  
144-105 Durable Power of Attorney  
144-106 Notice to Person Executing Power of Attorney  
144-107 Notice to Person Accepting Appointment as Agent  
144-108 Certification of Agent  
144-109 Affidavit of Physician (that Husband lacks capacity)  
144-110 Texas Probate Code Provisions  
144-111 Revocation of Power of Attorney  
144-112 Revocation of Medical Power of Attorney  
144-113 Declaration of Guardian  
144-114 Appointment of Guardian For Children  
144-115 Designation of Health Care Agent for Children  
144-116 Memorandum Regarding Personal Belongings  
144-117 Declaration for Mental Health Treatment  
144-118 Appointment of Agent to Dispose of Remains  
144-119 Form to Donate Body for Medical Study  
144-120 Gift by a Living Donor Exhibit  
144-121 Video Will Checklist

#### WIFE'S MISCELLANEOUS DOCUMENTS

144-201 Medical Power of Attorney  
144-202 HIPAA Release  
144-203 Directive to Physicians  
144-204 Combo Directive to Physicians & Medical POA  
144-205 Durable Power of Attorney  
144-206 Notice to Person Executing Power of Attorney  
144-207 Notice to Person Accepting Appointment as Agent  
144-208 Certification of Agent  
144-209 Affidavit of Physician (that Wife lacks capacity)  
144-210 Texas Probate Code Provisions  
144-211 Revocation of Power of Attorney  
144-212 Revocation of Medical Power of Attorney  
144-213 Declaration of Guardian  
144-214 Appointment of Guardian For Children  
144-215 Designation of Health Care Agent for Children  
144-216 Memorandum Regarding Personal Belongings  
144-217 Declaration for Mental Health Treatment  
144-218 Appointment of Agent to Dispose of Remains  
144-219 Form to Donate Body for Medical Study  
144-220 Gift by a Living Donor Exhibit  
144-221 Video Will Checklist

#### INDIVIDUAL'S MISCELLANEOUS DOCUMENTS

144-301 Medical Power of Attorney  
144-302 HIPAA Release  
144-303 Directive to Physicians  
144-304 Combo Directive to Physicians & Medical POA  
144-305 Durable Power of Attorney  
144-306 Notice to Person Executing Power of Attorney  
144-307 Notice to Person Accepting Appointment as Agent  
144-308 Certification of Agent  
144-309 Affidavit of Physician (that Indiv lacks capacity)  
144-310 Texas Probate Code Provisions  
144-311 Revocation of Power of Attorney  
144-312 Revocation of Medical Power of Attorney  
144-313 Declaration of Guardian  
144-314 Appointment of Guardian For Children



144-315 Designation of Health Care Agent for Children  
 144-316 Memorandum Regarding Personal Belongings  
 144-317 Declaration for Mental Health Treatment  
 144-318 Appointment of Agent to Dispose of Remains  
 144-319 Form to Donate Body for Medical Study  
 144-320 Gift by a Living Donor Exhibit  
 144-321 Video Will Checklist

#### **SAME-SEX SPOUSE / DOMESTIC PARTNER #1 MISC DOCS**

144-401 Medical Power of Attorney  
 144-402 HIPAA Release  
 144-403 Directive to Physicians  
 144-404 Combo Directive to Physicians & Medical POA  
 144-405 Durable Power of Attorney  
 144-406 Notice to Person Executing Power of Attorney  
 144-407 Notice to Person Accepting Appointment as Agent  
 144-408 Certification of Agent  
 144-409 Affidavit of Physician (that Spouse / DP #1 lacks capacity)  
 144-410 Texas Probate Code Provisions  
 144-411 Revocation of Power of Attorney  
 144-412 Revocation of Medical Power of Attorney  
 144-413 Declaration of Guardian  
 144-414 Appointment of Guardian For Children  
 144-415 Designation of Health Care Agent for Children  
 144-416 Memorandum Regarding Personal Belongings  
 144-417 Declaration for Mental Health Treatment  
 144-418 Appointment of Agent to Dispose of Remains  
 144-419 Form to Donate Body for Medical Study  
 144-420 Gift by a Living Donor Exhibit  
 144-421 Video Will Checklist

#### **SAME-SEX SPOUSE / DOMESTIC PARTNER #2 MISC DOCS**

144-501 Medical Power of Attorney  
 144-502 HIPAA Release  
 144-503 Directive to Physicians  
 144-504 Combo Directive to Physicians & Medical POA  
 144-505 Durable Power of Attorney  
 144-506 Notice to Person Executing Power of Attorney  
 144-507 Notice to Person Accepting Appointment as Agent  
 144-508 Certification of Agent  
 144-509 Affidavit of Physician (that Spouse / DP #2 lacks capacity)  
 144-510 Texas Probate Code Provisions  
 144-511 Revocation of Power of Attorney  
 144-512 Revocation of Medical Power of Attorney  
 144-513 Declaration of Guardian  
 144-514 Appointment of Guardian For Children  
 144-515 Designation of Health Care Agent for Children  
 144-516 Memorandum Regarding Personal Belongings  
 144-517 Declaration for Mental Health Treatment  
 144-518 Appointment of Agent to Dispose of Remains  
 144-519 Form to Donate Body for Medical Study  
 144-520 Gift by a Living Donor Exhibit  
 144-521 Video Will Checklist

#### **DEEDS**

144-601 Deed (H&W) - Transfer to Husband and Wife's Joint Revocable Trust  
 144-602 Deed (H&W) - Transfer half to H's Rev Trust & half to W's Rev Trust  
 144-603 Deed - Transfer to Husband's Revocable Trust  
 144-604 Deed - Transfer to Wife's Revocable Trust  
 144-605 Deed - Transfer to Individual's Revocable Trust  
 144-606 Deed - Transfer to Spouse / DP #1's Rev Trust  
 144-607 Deed - Transfer to Spouse / DP #2's Rev Trust  
 144-608 Deed (H&W) - Transfer to Husband and Wife's QPRT  
 144-609 Deed (H&W) - Transfer half to H's QPRT & half to W's QPRT  
 144-610 Deed - Transfer to Husband's QPRT  
 144-611 Deed - Transfer to Wife's QPRT  
 144-612 Deed - Transfer to Individual's QPRT

#### **SECTION 142 TRUST**

144-701 Section 142 Trust Agreement  
 144-702 Application to Establish Section 142 Trust  
 144-703 Order Establishing Section 142 Trust  
 144-704 Trustee's Application To Approve Sect. 142 Trustee Fees  
 144-705 Order Approving Section 142 Trustee's Fees

#### **SECTION 867 MANAGEMENT TRUST**

144-801 Section 867 Management Trust Agreement  
 144-802 Application to Establish Section 867 Trust  
 144-803 Order Establishing Section 867 Trust  
 144-804 Trustee's Application To Approve Sect. 867 Trustee Fees  
 144-805 Order Approving Section 867 Trustee Fees

#### **FAMILY LIMITED PARTNERSHIP**

144-901 Agreement of Limited Partnership  
 144-902 Certificate of Formation  
 144-903 Assignment of Limited Partner Interest  
 144-904 Subscription Agreement  
 144-905 Memorandum Regarding Administration of FLP  
 144-906 Assumed Name Certificate

#### **MARITAL PROPERTY AGREEMENTS**

##### **PRE-MARITAL PROPERTY AGREEMENT**

144-1001 Pre-marital Agreement  
 144-1002 Pre-marital Agreement Attorney Checklist (for use with Form 144-901)  
 144-1003 Voluntary Waiver of Further Disclosure (for use with Form 144-901)  
 144-1004 Reaffirmation of Premarital Agreement (for use with Form 144-901)

##### **POST-MARITAL PROPERTY AGREEMENT - COMPREHENSIVE**

144-1101 Post-marital Agreement - Comprehensive  
 144-1102 Post-marital Agreement Attorney Checklist (for use with Form 144-1001)  
 144-1103 Voluntary Waiver of Further Disclosure (for use with Form 144-1001)

##### **POST-MARITAL PROPERTY AGREEMENT - CASH AND SPECIFIED ASSETS**

144-1201 Post-marital Agreement - Cash and Specified Assets  
 144-1202 Voluntary Waiver of Further Disclosure (for use with Form 144-1101)

##### **AGREEMENT TO CONVERT SEPARATE PROPERTY TO COMMUNITY PROPERTY**

144-1301 Agreement to Convert Separate Property to Community Property

#### **AUTHORIZATION AGREEMENTS**

144-1401 Authorization Agreement (for Husband and Wife)  
 144-1402 Authorization Agreement  
 144-1403 Authorization Agreement (Same-sex Spouse #1 / DP #1)  
 144-1404 Authorization Agreement (Same-sex Spouse #2 / DP #2)  
 144-1405 Authorization Agreement For Nonparent Relative - DFPS Form 2638

#### **BUY SELL AGREEMENTS**

144-1501 Wait and See Buy Sell Agreement  
 144-1502 Cross Purchase Buy Sell Agreement  
 144-1503 Stock Redemption Buy Sell Agreement

#### **MISCELLANEOUS LETTERS & FORMS**

##### **ANSWERS TO FREQUENTLY ASKED QUESTIONS**

144-1601 Answers to Frequently Asked Questions

##### **TRUST ADMINISTRATION DOCUMENTS**

144-1701 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