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**CALIFORNIA
LIFE DOCUMENTS
PLANNING PACKAGE**

Control Number: CA-P001-PKG





U.S. Legal Forms™ thanks you for your purchase of a Personal Planning Package. This package is an important tool to help you organize your legal affairs as you begin to think about entering a later stage of life. It contains key legal documents that are vital for you to maintain on file and safeguard in event of an emergency or unforeseen life event.

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I. FORM LIST

With your Life Documents Planning package, you will find the state specific forms that will help you prepare for and protect yourself and your loved ones from events that may affect your health, your finances and your affairs after your death.

Included in your package are the following forms:

- 1. A Last Will and Testament that suits your specific needs
(control number varies)
- 2. A General Durable Power of Attorney **(CA-P003A)**
- 3. Durable Power of Attorney Healthcare **(CA-P016)**
- 4. Statutory Form of Advanced Health Care Directive **(CA-P021)**
- 5. Uniform Statutory Power of Attorney - Property - Finances
- Section 4401 **(CA-P040)**
- 6. Statutory Notice Required for Printed Durable POA Forms
(CA-P041)
- 7. Estate Planning Questionnaire and Worksheets **(CA-WIL-801)**

8. Personal Planning Information and Document Inventory
Worksheets **(US-00PPF)**
9. Financial Statement Form - Universal **(US-00552-J)**

II. DESCRIPTIONS OF FORMS

Brief descriptions of the forms contained in your U.S. Legal Forms™ Personal Planning Package are found below.

Last Will - Complete this form to detail in writing your wishes regarding who is to receive your property at death and who will administer your estate. It also enables you to appoint trustees or guardians, if applicable. **(Control number varies)**

General Durable Power of Attorney for Property and Finances Effective Immediately - This General Durable Power of Attorney is a general, durable power of attorney which is effective IMMEDIATELY. The powers granted to an Agent in this Power of Attorney are very broad. This Power of Attorney does NOT provide for health care services. This form complies with all applicable state statutory laws. **(CA-P003A)**

Statutory Durable Power of Attorney for Health Care - This form is a durable power of attorney for health care pursuant to California Probate Code Section 4701. The principal must list his/her desires, special provisions, and limitations. The principal may also use this form if he/she wants to limit the term of the durable power of attorney. **(CA-P016)**

Health Care Directive - This is a statutory form that is provided for in the California Probate Code. It is a multi-part document that provides a variety of options for the user. Part 1 of this form is a power of attorney for health care. Part 1 lets you name another individual as agent to make health care decisions for you if you become incapable of making your own decisions or if you want someone else to make those decisions for you now even though you are still capable. Part 2 of this form lets you give specific instructions about any aspect of your health care, whether or not you appoint an agent. Part 3 of this form lets you express an intention to donate your bodily organs and tissues following your death. Part 4 of this form lets you designate a physician to have primary responsibility for your health care. **(CA-P021)**

Uniform Statutory Power of Attorney - Property - Finances - Section 4401 - This form is a Uniform Statutory Form of Power of Attorney for California for property, finances and other powers you specify. It also provides that it can be durable. **(CA-P040)**

Statutory Notice Required for Printed Durable POA Forms - This Notice is required on a printed form of a durable power of attorney that is sold or otherwise distributed in California for use by a person who does not have the advice of legal counsel. It shall be in not less than 10-point boldface type or a reasonable equivalent. This notice is not required for the Uniform Statutory Power of Attorney form. **(CA-P041)**

Estate Planning Questionnaire and Worksheets - This Estate Planning Questionnaire and Worksheet is for completing information relevant to an estate. It contains questions for personal and financial information. You may use this form for client interviews. It is also ideal for a person to complete to view their overall financial situation for estate planning purposes. **(CA-WIL-801)**

Personal Planning Information and Document Inventory Worksheets - This form enables you to document matters relevant to your life and personal planning such as the location of your important legal documents, relative's names, contact information, medical information, financial asset inventory and more. **(US-00PPF)**

Financial Statement Form – Universal Use - This form outlays the assets and liabilities of an individual. The form contains sections which ask the individual to identify the following: current assets, current liabilities, deferred assets, and net worth. **(US-00522-J)**

If you need additional information, please visit www.uslegalforms.com and look up forms by subject matter. You may also wish to visit our legal definitions page at <http://definitions.uslegal.com/>

III. LEGAL DOCUMENT STORAGE

Once you prepare legal documents and forms in your U.S. Legal Forms™ Essential Legal Life Documents Package, it is highly recommended that you keep forms together. An optional USLegal Life Documents Organizer is available for purchase from www.uslegalforms.com to help store your legal documents.

Legal documents should also be kept in a very secure place such as a bank safe deposit box or personal home safe. You may wish to tell your attorney or a family member about the location of your Legal Life Documents Package in the event you are unable to communicate it to them when needed.

IV. TIPS ON COMPLETING THE FORMS

The form(s) in this packet may contain “form fields” created using Microsoft Word or Adobe Acrobat (“.pdf” format). “Form fields” facilitate completion of the forms using your computer. They do not limit your ability to print the form “in blank” and complete with a typewriter or by hand.

It is also helpful to be able to see the location of the form fields. Go to the View menu, click on Toolbars, and then select Forms. This will open the Forms toolbar. Look for the button on the Forms toolbar that resembles a shaded letter “a”. Click this button and the form fields will be visible.

By clicking on the appropriate form field, you will be able to enter the needed information. In some instances, the form field and the line will disappear after information is entered. In other cases, it will not. The form was created to function in this manner.

V. DISCLAIMER

These materials were developed by U.S. Legal Forms, Inc. based upon statutes and forms for the subject state. All information and Forms are subject to this Disclaimer:

All forms in this package are provided without any warranty, express or implied, as to their legal effect and completeness. Please use at your own risk. If you have a serious

legal problem, we suggest that you consult an attorney in your state. U.S. Legal Forms, Inc. does not provide legal advice. The products offered by U.S. Legal Forms (USLF) are not a substitute for the advice of an attorney.

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