

COLORADO
LIFE DOCUMENTS
PLANNING PACKAGE

Control Number: CO-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. Last Will and Testament (**control number varies**)
- 2. Statutory Medical Durable Power of Attorney (**CO-P015**)
- 3. General Durable Power of Attorney for Property and Finances (**CO-P003A**)
- 4. Agent's Affidavit that Power of Attorney not revoked (**CO-P006**)
- 5. Statutory General Power of Attorney with Durable Provisions (**CO-P012**)
- 6. Statutory Equivalent of Living Will or Declaration (**CO-P024**)
- 7. Estate Planning Questionnaire and Worksheets (**CO-WIL-801**)
- 8. Personal Planning Information and Document Inventory Worksheets (**US-00PPF**)
- 9. Financial Statement-Universal Form (**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)**

Statutory Medical Durable Power of Attorney - This is a statutory form that is provided for in the Colorado Revised Statutes. This document gives the person you name as your agent the authority to make any and all health care decisions for you when you are no longer capable of making them yourself. **(CO-P015)**

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. **(CO-P003A)**

Agent's Affidavit that Power of Attorney not revoked - Based on 15-1-1302, 15-14-501, and 15-14-502, Colorado Revised Statutes. Agent states that Power of Attorney remains in effect and has not been revoked. **(CO-P006)**

Statutory General Power of Attorney with Durable Provisions - This is a statutory form that is a general, durable and/or limited power of attorney, depending on how you use it. It grants your attorney in fact (your agent) VERY broad powers with regard to your property and finances. If you wish to grant only limited powers, initial only those powers and cross out the powers you don't want the agent to have. You may also specify if you wish to have it remain in effect in case you become disabled, incapacitated, or incompetent. This Power of Attorney does NOT provide for health care services. **(CO-P012)**

Statutory Equivalent of Living Will or Declaration - This Colorado Medical Orders for Scope of Treatment (MOST) is to be completed by a health care professional based on patient preferences and medical indications. These Medical Orders must be signed by a physician, advanced practice nurse, or physician assistant to be valid. Physician Assistants must include physician name and contact information. **(CO-P024)**

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. **(CO-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:

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