

**NEW YORK
LIFE DOCUMENTS
PLANNING PACKAGE**

Control Number: NY-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. Statutory Durable Power of Attorney **(NY-P012)**
- 3. Health Care Proxy **(NY-P020)**
- 4. Durable General Power of Attorney Effective at a Future
Time **(NY-P012A)**
- 5. An Estate Planning Questionnaire and Worksheet **(NY-
WIL-801)**
- 6. Personal Planning Information and Document Inventory
Worksheets **(US-00PPF)**
- 7. Financial Statement-Universal Form **(US-00522-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 and Testament – 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 Form of Durable Power of Attorney - Durable Provisions - This is a statutory form that is provided for in the New York State Consolidated Laws **(NY-P012)**

Health Care Proxy Health Care Decisions - Statutory form including Living Will provisions - This Healthcare Proxy allows you to choose an agent to speak for you and make specific instructions for your treatment, in the event that you become incapable of voicing these instructions yourself. **(NY-P020)**

Durable General Power of Attorney Effective at a Future Time - This is a form that is provided for in the New York State Consolidated Laws. **(NY-P012A)**

Estate Planning Questionnaire – Complete this form to assist attorneys, estate planners, and other professionals with details regarding your home and other property you own and additional assets including investments, life insurance policies, individual retirement accounts and so forth so that they can best recommend a course of action regarding your estate. **(NY-WIL-801)**

Personal Planning/Documents Inventory Form – Complete this form to retain important information on file relevant to your life such as names of relatives, their contact information, your medical information, financial asset inventory, the location of your important legal documents 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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