

# Westlaw Form Builder – General Practice Massachusetts

## MASSACHUSETTS ATTORNEY-CLIENT

### MATTERS

#### **INFORMATION WORKSHEETS**

Client Information Form  
Witness Telephone Interview Sheet  
Witness Information Sheet

#### **LETTERS & NEW CLIENT FORMS**

Letter to Confirm Appointment and Directions to Office  
Letter to Prospective Client Declining Representation  
New Client Letter  
Receipt for Client's Documents  
Transmittal Letter to New Client  
Letter to Avoid Conflict of Interest  
Letter Advising of Case Referral and Referral Fee  
Letter to Witness Requesting Information  
Letter to Client - Confirming Decision Contrary to Legal Advice  
Letter to Client - Confirming Decision Not to Contest Case  
Letter to Client When Attorney Cannot Contact Client  
Letter to Client - Advising in Favor of Offer  
Letter to Client - Advising Against Offer  
Letter Withdrawing as Attorney of Record Prior to Suit  
Letter to Client - Demanding Payment on Account  
Authorization for Release of Records - Medical and Billing (HIPAA)  
Authorization for Release of Records - Financial Institution  
Authorization for Release of Records - Employment  
Authorization for Release of Records - General

#### **FEE AGREEMENTS**

Attorney Fee Letter Agreement  
Attorney Fee Agreement for Hourly Clients - Short form  
Attorney Fee Agreement for Hourly Clients  
Attorney Fee Agreement for Contingency Cases - Mass R Prof C 1.5(f)  
Pro Bono Representation Agreement

#### **RELEASE & CLOSING DOCUMENTS**

Settlement Disclosure Statement and Acknowledgment  
Settlement Disbursement and Release of Attorney  
Release of Attorney Prior to Settlement or Distribution of Funds  
Letter and Client Satisfaction Questionnaire

## MASSACHUSETTS BUSINESS ORGANIZATIONS

### **BUSINESS AND PROFESSIONAL CORPORATIONS FORMATION**

Articles of Organization - Domestic Profit Corporation  
Articles of Organization - Professional Corporation

#### **PROFESSIONAL CORPORATION**

Regulatory Board Certificate  
Annual Report - Professional and Foreign Professional Corporations

#### **MAINTENANCE**

Annual Report - Domestic and Foreign Corporations  
Articles of Amendment - Corporation  
Statement of Change of Supp Information in Article 8 of Art of Org - Corp  
Statement of Appointment of Registered Agent  
Statement of Change of Registered Agent or Registered Office  
Statement of Change of Registered Office Address by Reg Agent  
Statement of Resignation of Registered Agent  
Certificate of Resignation of Director or Officer  
Articles of Correction - Corporation  
Restated Articles of Organization - Corporation



# Westlaw Form Builder – General Practice Massachusetts

## TERMINATION OR DISSOLUTION

Articles of Voluntary Dissolution - Corporation  
Articles of Vol Diss before Issuing Shares or Commencing Business - Corp  
Articles of Revocation of Dissolution - Corporation  
Application for Revival - Corporation  
Application for Reinstatement Following Administrative Dissolution - Corp  
Articles of Charter Surrender - Corporation  
Articles of Charter Surrender Upon Converts to a Foreign Other Entity - Corp  
Articles of Charter Surrender Upon Foreign Nonprofit Conversion - Corp

## MERGER OR CONVERSION

Articles of Merger Involving Domestic Entities - Corporation  
Articles of Merger - Dom or Foreign Corps or Foreign Other Entities - Corp  
Articles of Conversion - Domestic Business Corp to Dom Other Entity - Corp  
Articles of Conversion - Domestic Other Entity to Dom Business Corp - Corp  
Articles of Conversion - Foreign Other Entity to Dom Business Corp - Corp  
Articles of Share Exchange - Domestic Corps and Other Entities - Corp  
Articles of Share Exchange - Dom or Foreign Corps or Other Entity - Corp

## NON-PROFIT CORPORATION

Articles of Organization - Nonprofit Corporation  
Annual Report - Nonprofit Corporation  
Articles of Amendment - Nonprofit Corporation  
Certificate of Change of Directors or Officers - Nonprofit Corporation  
Certificate of Change of Principal Office - Nonprofit Corporation  
Certificate of Change of Fiscal year - Nonprofit Corporation  
Certificate of Appointment of Resident Agent - Nonprofit Corporation  
Certificate of Revocation of Appointment of Resident Agent - NP Corp

## NON-PROFIT CORPORATION (continued)

Certificate of Change of Address of Resident Agent - Nonprofit Corporation  
Certificate of Resignation of Resident Agent - Nonprofit Corporation  
Restated Articles of Organization - Nonprofit Corporation  
Certificate of Correction - Nonprofit Corporation  
Application for Revival - Nonprofit Corporation  
Articles of Consolidation or Merger - Domestic NP Corps  
Articles of Consolidation or Merger - Domestic and Foreign NP Corps

## FOREIGN CORPORATION

Certificate of Registration - Foreign Corporation  
Regulatory Board Certificate - Foreign Corporation  
Exhibit to Foreign Prof Corporation Certificate - Foreign Corporation  
DBA Attachment - Foreign Corporation  
Annual Report - Domestic and Foreign Corps  
Annual Report - Professional and Foreign Professional Corps  
Certificate of Amendment - Foreign Corporation  
Statement of Change of Registered Office or Agent - Foreign Corporation  
Statement of Change of Registered Office by Registered Agent - Foreign Corp  
Statement of Resignation of Registered Agent - Foreign Corporation  
Articles of Correction - Foreign Corporation  
Foreign Certificate of Withdrawal - Foreign Corporation  
Cert of Withdrawal Upon Conversion to a Nonfiling Entity - Foreign Corp  
Appl for Reinstatement of Authority to Transact Business - Foreign Corp  
Articles of Domestication - Foreign Corporation  
Articles of Foreign Nonprofit Domestication and Conversion - Foreign Corp  
Articles of Merger - Dom Corps, Foreign Corps or Other Foreign Entities  
Articles of Share Exchange - Dom or Foreign Corp and Other Foreign Entities  
Foreign Application for Transfer of Authority - Foreign Corporation

# Westlaw Form Builder – General Practice Massachusetts

## LIMITED PARTNERSHIP

### DOMESTIC LIMITED PARTNERSHIP

Limited Partnership Certificate - Limited Partnership  
Annual Report - Limited Partnership  
Appl for Reinstatement Following Admin Dissolution - Limited Partnership

### FOREIGN LIMITED PARTNERSHIP

Application for Registration - Foreign LP  
Annual Report - Foreign LP  
Application for Reinstatement Authority to Transact Business - Foreign LP

### OTHER LIMITED PARTNERSHIP

Statement of Change of Resident Agent or Office - Limited Partnership  
Statement of Change of Resident Office by Res Agent - Limited Partnership  
Resignation of Resident Agent - Limited Partnership

## LIMITED LIABILITY COMPANY

### DOMESTIC LIMITED LIABILITY COMPANY

Certificate of Organization - LLC  
Certificate of Organization - Professional LLC  
Annual Report - LLC  
Annual Report - Professional LLC  
Application to Reinstate after Administrative Dissolution - LLC

### FOREIGN LIMITED LIABILITY COMPANY

Application for Registration - Foreign LLC  
Application for Registration - Foreign Professional LLC  
Annual Report - Foreign LLC  
Annual Report - Foreign Professional LLC  
Application for Reinstatement Following Admin Revocation - Foreign LLC

### OTHER LIMITED LIABILITY COMPANY

Statement of Change of Resident Agent or Resident Office - LLC  
Change of Resident Office Address by Resident Agent - LLC  
Statement of Resignation of Resident Agent - LLC

Date of Issue: February 27, 2012

## MISCELLANEOUS BUSINESS FORMS

Certificate of Regulatory Board  
DBA Attachment - LLC or LLP or LP  
Application of Reservation of Name

## UNIFORM COMMERCIAL CODE

UCC-1 Financing Statement  
UCC-1Ad Financing Statement Addendum  
UCC-3 Financing Statement Amendment  
UCC-3Ad Financing Statement Amendment Addendum  
UCC-5 Statement of Claim  
UCC-11 Information Request

## MASSACHUSETTS FAMILY LAW

## CLIENT MATTERS AND GENERAL CORRESPONDENCE

### CLIENT MATTERS

Domestic Relations Fee Agreement  
Client Information Form

### LETTERS TO CLIENT

Letter to Client - Needed Documents  
Letter to Client - Financial Information  
Letter to Client - Discovery to Answer  
Letter to Client - Instructions Before Client's Deposition  
Letter to Client - Review, Correct and Sign Deposition  
Letter to Client - Regarding Third Party Deposition  
Letter to Client - Confirming Client Request Not to Proceed  
Letter to Client - Advising Against Settlement  
Letter to Client - Advising in Favor of Settlement  
Letter to Client - Holiday Contact with Children, Setting Hearing  
Letter to Client - Requesting Payment for Third Party Services  
Letter to Client - Transmittal of Documents  
Letter to Client - General Reminder  
Letter to Client - Hearing - Client Required

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## LETTERS TO CLIENT

Letter to Client - Hearing - Client Not Required  
Letter to Client - Closing Checklist  
Letter to Client - Appreciation at Close of Case  
Letter to Client - Reminder of Overdue Bill  
Letter to Client - Collection  
Letter to Client - Motion to Withdraw  
Letter to Client - Returning File to Client

## LETTERS TO OPPOSING ATTORNEY

Letter to Opposing Attorney - Transmittal  
Letter to Opposing Attorney - Informal Exchange of Discovery  
Letter to Opposing Attorney - Cover for Subpoena  
Letter to Opposing Attorney - Review, Correct and Sign Deposition  
Letter to Opposing Attorney - Returning Deposition After Review  
Letter to Opposing Attorney - Reminder to Furnish Discovery  
Letter to Opposing Attorney - Request for Extension of Time  
Letter to Opposing Attorney - Offer to Mediate  
Letter to Opposing Party - Proposing Settlement

## OTHER LETTERS

Letter to Stenographer - Schedule Deposition  
Letter to Stenographer - Returning Deposition After Review  
Letter to Non-Party Deponent - Review, Correct and Sign Deposition  
Letter to Witness - Testimony  
Letter to Expert Witness - Testimony  
Letter to Register - Transmittal  
Letter to Register - Request for Copies  
Letter to Register - Requesting Date for Hearing  
Letter to Register - Issuance of Summons  
Letter to Judge or Register - Transmittal of Order  
Letter to Creditor of Client - Forbearance During Divorce  
Letter to School - Pickup of Children, Other Party is Enjoined  
Letter - Thank You for Referral  
Letter - Shell

## INITIAL DOCUMENTS

### JOINT PETITIONS

Certificate of Absolute Divorce or Annulment - 1A (R-408)  
Joint Motion to File Uncertified Copy of Marriage Certificate - 1A  
Financial Statement - Short Form - 1A (CJ-D 301 S)  
Financial Statement - Long Form - 1A (CJ-D 301 L)  
Affidavit Disclosing Care or Custody of a Child - 1A (OCAJ-1 TCR IV)  
Child Support Guidelines Worksheet - 1A (CJ-D)  
Public Assistance Affidavit - 1A (CJ-D)  
Uniform Counsel Certification - 1A (CCF)  
Probate and Family Court Department Intake Report - 1A (CJ-D)

### OTHER CAUSES OF ACTION

Certificate of Absolute Divorce or Annulment (R-408)  
Motion to File Uncertified Copy of Marriage Certificate  
Financial Statement - Short Form (CJ-D 301 S)  
Financial Statement - Long Form (CJ-D 301 L)  
Affidavit Disclosing Care or Custody of a Child (OCAJ-1 TCR IV)  
Child Support Guidelines Worksheet (CJ-D)  
Public Assistance Affidavit (CJ-D)  
Uniform Counsel Certification - (CCF)  
Probate and Family Court Department Intake Report (CJ-D)

### SERVICE

Letter to Process Server - Instruction for Service  
Motion for Alternate Service by Publication and Mailing (CJ-D)  
Affidavit in Support of Motion for Alternate Service (CJ-D)  
Letter to Newspaper - Publication of Summons  
Proof of Service  
Motion to Enlarge Time for Service of Process

### SEPARATE SUPPORT

Complaint for Separate Support (CJ-D 102)  
Answer to Complaint for Separate Support  
Proposed Temporary Order for Separate Support  
Proposed Judgment of Separate Support  
Complaint for Support Pursuant to MGL c 209 sec 32F (CJ-D 107)  
Agreement for Proposed Judgment on Comp for Support under MGL c 209 sec 32F  
Proposed Judgment Under MGL c 209 sec 32F  
Petition and Proposed Order Under MGL c 209 sec 37

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## **DIVORCE**

### **DIVORCE 1A**

Joint Petition for Divorce Pursuant to MGL c 208 sec 1A (CJ-D 101A)  
Affidavit of Irretrievable Breakdown (CJ-D)  
Separation Agreement - 1A  
Joint Motion to Approve Separation Agreement - 1A  
Joint Proposed Judgment of Divorce Nisi - 1A

### **DIVORCE AND DIVORCE 1B**

#### **PLAINTIFF'S PLEADINGS**

Complaint for Divorce (CJ-D 101)  
Complaint for Divorce 1B (CJ-D 101B)  
Demand for Financial Statement  
Motion to Compel Financial Statement  
Motion to Stay the Prosecution of Foreign Divorce Action

#### **DEFENDANT'S PLEADINGS**

Motion to Dismiss Divorce Complaint  
Motion for a More Definite Statement  
Answer to Divorce Complaint  
Answer and Counterclaim for Divorce  
Motion to Consolidate Divorce Complaints  
Motion to Change Venue

### **DIVORCE MOTIONS**

Motion to Transfer Divorce Complaint  
Motion to Amend Complaint to Add Name of Co-Defendant  
Affidavit in Support of Motion to Amend Complaint to Add Co-Defendant  
Notice of Voluntary Dismissal of Divorce (CJ-D)

## **TEMPORARY ORDERS FOR DIVORCE**

Motion for Temporary Orders  
Affidavit on Motion for Temporary Orders  
Motion for Temporary Alimony  
Motion for Parenting Plan  
Parenting Plan  
Proposed Order for Parenting Plan  
Motion for Temporary Child Support  
Motion to Modify the Temporary Custody Order  
Motion for Temporary Sole Physical Custody and Shared Legal Custody  
Motion for Temporary Order Allowing for Visitation  
Motion to Modify Temporary Support  
Motion to Modify Temporary Custody  
Motion for TRO to Prevent Transfer of Marital Assets  
Affidavit in Support of Motion for TRO Against Transfer of Marital Assets  
Proposed Temporary Restraining Order to Preserve Marital Assets

## **AGREEMENTS AND JUDGMENTS**

Child Support Findings - Deviation (CJ-D)  
Separation Agreement - Divorce and Divorce 1B  
Motion to Approve Marital Separation Agreement - Divorce and Divorce 1B  
Proposed Judgment - Divorce and Divorce 1B

## **CLOSING DOCUMENTS**

Quit Claim Deed  
Qualified Domestic Relations Order (QDRO)  
Letter to Creditor - Closing Account  
Letter to Life Insurance Company - Beneficiary Change  
Letter to Health Insurance Company - Termination of Coverage  
Letter to Health Insurance Company - COBRA  
Letter to Pension Plan Administrator- Beneficiary Change  
Proposed Order for Support, Health Insurance and Income Assignment  
Release or Revocation of Release of Claim to Exemption (IRS Form 8332)

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## MOTION PRACTICE

Motion to Waive Attendance at Parent Education Program - 1A (CJ-D 444)  
Motion to Waive Attendance at Parent Education Program - (CJ-D 444)  
Motion to Appoint Guardian Ad item  
Motion to Appoint Attorney for Minor Children  
Motion for Leave to Withdraw Appearance  
Affidavit in Support of Motion for Leave to Withdraw Appearance  
Ex Parte Motion to Impound Affidavit in Supp of Motion to Withdraw Appear  
Ex Parte Motion to Review Order Denying Motion to Withdraw Appearance  
Stay of Proceedings Under the Service members Civil Relief Act of 2003  
Motion to Strike a Motion Under Rules 12(f) and 11(a)  
Request for Case Management Conference (CJ-D 99)  
Agreement of the Parties for Case Management (CJ-D)  
Motion to Extend Time to File Attached Pleadings  
Stipulation of Dismissal (CJ-D)  
Motion for Short Order on Notice of Motion  
Proposed Order on Motion for Short Order on Notice of Motion  
Motion to Appear by Telephone (CJ-D)  
Motion to Remove a Minor Child from the Commonwealth  
Motion to Restrain Other Party from Removing Child from the Commonwealth  
Motion for Writ Ne Exeat  
Motion to Strike a Memorandum and for Sanctions (Shell)  
Stipulation - Shell  
Motion - General (CJ-D 400)  
Affidavit - General - Client (CJ-D)  
Affidavit - Emergency - Client (CJ-D)  
Affidavit - General - Counsel (CJ-D)  
Affidavit - Emergency - Counsel (CJ-D)  
Order - Proposed (CJ-D)

## TEMPORARY ORDERS

Motion for Restraining Order Against Entertaining Non-Related Adult  
Motion for Allowance of Counsel Fees  
Affidavit of Client in Support of Motion for Allowance of Counsel Fees

## TEMPORARY ORDERS (continued)

Affidavit of Counsel in Support of Motion for Allowance of Counsel Fees  
Motion for Evidentiary Hearing on App for Allowance of Counsel Fees  
Motion to Take Deposition Prior to Order for Temp Counsel or Expert Fees  
Motion for Allowance to Retain CPA  
Motion to Prohibit a Party From Imposing Restraint on Personal Liberty  
Proposed Order to Prohibit Restraint of the Personal Liberty of Another  
Complaint for Protective Order  
Proposed Domestic Relations Protective Order  
Motion to Impound Address (CJ-D)  
Affidavit in Support of Motion to Impound Address (CJ-D)  
Appointment of Agent (CJ-D)  
Motion to Vacate Marital Home  
Affidavit in Support of Motion to Vacate Marital Home  
Motion to Extend Vacate Order  
Motion to Postpone Vacate Order  
Motion for Return of Banking Records  
Motion to Compel Return of Funds Removed from Joint Bank Account  
Motion to Compel Return of Credit Cards  
Motion to Compel Execution of Tax Returns  
Motion for Conveyance of Marital Home  
Motion to Compel Inspection of Property and for Sanctions  
Motion to Remove Personal Property  
Motion to Compel the Return of Personal Property  
Motion to Attach Personal Property  
Motion to Attach Real Estate  
Affidavit in Support of the Attachment of Real Estate  
Proposed Findings and Order for Approval of Attachment  
Proposed Findings and Ex Parte Order for Approval of Attachment  
Motion for Trustee Process  
Motion to Attach Pension by Trustee Process  
Proposed Findings and Order for Approval of Attachment on Trustee Process  
Prop Findings and Ex Parte Order for Approval of Attach on Trustee Process  
Motion to Waive Security Prior to Issuance of Temporary Restraining Order

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## DISCOVERY

Motion to Set Schedule for Completion of Discovery  
Certification of Discussion Between Counsel  
Motion for Appointment of a Master to Monitor Discovery  
Request for Production of Documents  
Motion to Compel the Production of Documents  
Interrogatories to be Answered Under Oath  
Interrogatories to be Answered by Expert Witness  
Motion to File and Serve in Excess of Thirty Interrogatories  
Motion to Compel Answers to Interrogatories  
Motion for a Protective Order as to Interrogatories  
Request for Admissions  
Motion to Withdraw Admissions  
Motion for Expenses for Failure to Admit  
Notice of Deposition - Opposing Party  
Notice of Deposition - Witnesses  
Notice of Deposition - Expert Witness  
Motion to Quash Notice of Deposition  
Subpoena for Deposition - Witness  
Return of Service of Notice of Deposition  
Subpoena for Deposition - Expert Witness  
Motion to Quash Deposition Subpoena  
Motion to Compel Answers to Deposition and for Sanctions  
Motion for Protective Order for Compliance with Deposition Schedule  
Motion to Change Place of Taking of Deposition  
Motion to Prohibit Taking of Deposition  
Motion for Sanctions for Failure to Attend Deposition  
Motion to Seal Deposition  
Motion for Leave to Take Limited Deposition  
Motion for Appointment of Person To Take Out of State Deposition  
Proposed Order for Appointment of Person to Take Out of State Deposition  
Motion for Issuance of Commission to Take Out of State Deposition  
Proposed Order for Issuance of Commission  
Commission to Take Out of State Deposition  
Motion for Letters Rogatory  
Letter Rogatory  
Motion to Compel Inspection of Real Estate  
Motion for a Court Order Requiring Mental Examinations  
Motion for Allowance of Counsel Fees and Discovery Expenses  
Request for Copy of Tax Return (IRS Form 4506)  
Request for Transcript of Tax Return (IRS Form 4506-T)  
Date of Issue: February 27, 2012

## TRIAL MOTIONS

Pre-trial Notice and Proposed Order  
Motion to Set Pre-trial Conference  
Motion to Continue Pre-trial Conference  
Motion to Recuse Judge  
Affidavit on Motion to Recuse Judge  
Motion to Strike Affidavit on Motion to Recuse Judge  
Request for Stenographer  
Subpoena for Trial - Witness  
Subpoena for Trial - Expert Witness  
Motion to Quash Subpoena  
Motion for Issuance of Bench Warrant  
Motion to Appoint a Master to Hear the Evidence  
Agreement on Selection of Master  
Motion to Enlarge Order of Reference Appointing Master  
Motion to Revoke Order of Reference  
Motion to Confirm Report of Master  
Motion to Strike the Report of the Master and to Recommit  
Objections to the Report of the Master  
Motion for Continuance  
Motion to Shorten Time for Notice to Hear Motion for Continuance  
Motion to Bifurcate Trial and Stay Divorce Action  
Proposed Order on Motion to Bifurcate Trial and Stay Divorce Action  
Motion in Limine  
Motion to Preclude Use of Expert Testimony  
Motion for Summary Judgment

## POST JUDGMENT

Motion for New Trial  
Motion for Relief From Judgment  
Motion to Correct Clerical Error  
Notice of Appeal

# Westlaw Form Builder – General Practice Massachusetts

## ENFORCEMENT

Complaint for Contempt (CJ-D 103)  
Complaint for Civil Contempt for Non-Support  
Request for Assignment (CJ-D)  
Motion to Dismiss Complaint for Contempt  
Answer to Contempt Complaint  
Motion for Short Order of Notice for Contempt  
Agreement on Judgment for Contempt  
Complaint to Enforce Foreign Judgment  
Affidavit of Filing of Certified Child Custody Judgment (CJ-D)  
Motion for Writ of Habeas Corpus  
Complaint for Trustee Process of Disposable Earnings  
Complaint for Judicial Review (CJ-D 310)

## MODIFICATION

Complaint for Modification (CJ-D104)  
Motion to Dismiss Complaint for Modification  
Answer to Complaint for Modification  
Joint Petition for Modification of Child Support (CJ-D 114)  
Proposed Judgment for Modification  
Post Divorce Complaint for Property Assignment

## UNIFORM INTERSTATE FAMILY AND SUPPORT ACT (UIFSA)

Notice of Determination of Controlling Order (UIFSA)  
General Testimony (UIFSA)  
Locate Data Sheet (UIFSA)  
Affidavit in Support of Establishing Paternity (UIFSA)  
Registration Statement (UIFSA)  
Child Support Enforcement Transmittal #1, Initial Request (UIFSA)  
Child Support Enforcement Transmittal #2, Subsequent Actions (UIFSA)  
Child Supp Enforcement Transmittal #3, Req for Assist or Discovery (UIFSA)  
Uniform Support Petition (UIFSA)  
National Medical Support Notice (UIFSA)  
Order or Notice to Withhold Income for Child Support (UIFSA)  
Notice of Lien Form (UIFSA)

## PATERNITY

Complaint to Establish Paternity (CJ-D 106)  
Complaint to Establish Paternity - Child Plaintiff (CJ-D 106)  
Complaint for Support, Custody and Visitation (CJ-D 109)  
Complaint for Support, Custody and Visitation - Child Plaintiff (CJ-D 109)  
Complaint for Paternity-In-Equity (CJ-D)  
Motion for Clerk to Release Copy of a Child's Birth Certificate (CJ-D)  
Affidavit in Support of Motion to Release Copy of Birth Certificate (CJ-D)  
Voluntary Acknowledgment of Parentage (R-132)  
Affidavit of Nonpaternity (CJ-D)  
Statement of Information Required for Amendment of Birth Record (CJ-D)

## MISCELLANEOUS

### GRANDPARENT ACCESS

Petition for Grandparent Visitation (CJ-D 105)  
Answer to Grandparent Visitation  
Proposed Findings and Order for Grandparent Visitation

### INDIGENCY FORMS

Affidavit of Indigency (CJ-D)  
Supplement to Affidavit of Indigency (CJ-D)  
Affidavit - Inmate (CJ-D)

### MISCELLANEOUS FORMS

Antenuptial Agreement (Premarital, Prenuptial)  
Reconciliation Agreement  
Complaint for Annulment (CJ-D 100)  
Change of Name (CJ-P 27)  
Request for Record Information (CP-2)  
Child Support Intake Form and Application for Full Child Supp Service (DOR)  
Motion to Impound Court Records  
Affidavit - Caregiver Authorization  
Complaint to Determine Dischargeability of Marital Obligation  
Request for Interpreter Services (CJ-D)  
Request for Copies - 1A (CJ-D)  
Request for Copies (CJ-D)



# Westlaw Form Builder – General Practice Massachusetts

## MASSACHUSETTS LITIGATION

### CLIENT MATTERS AND GENERAL CORRESPONDENCE

#### FEE AGREEMENTS

Contingent Fee Agreement  
Flat Fee Agreement  
Hourly Fee Agreement  
Acknowledgment of Attorney Fee Sharing Agreement

#### CLIENT INTAKE

Client Information Sheet - Personal Injury  
Client Information Sheet - General

#### RELEASES

Consent for Release of Confidential Health Care Information (HIPAA)  
Client's Authorization for Employment Records  
Consent for Release of Information - Social Security (SSA-3288)  
Release - Authorization to Obtain Insurance Information

#### CLIENT CORRESPONDENCE

Letter to Potential Client - follow up after phone conference  
Letter Declining Representation - Optional Release  
Letter to New Client  
Letter to Client - Status Report, Request for Info  
Letter to Client - Insurer's Medical Exam  
Letter to Client - Preparing for Claim - with damages questionnaire  
Letter to Client - Urging Continued Treatment with Doctor  
Letter to Client - Hiring Economist  
Letter to Client - Requesting Authority to File Suit  
Letter to Client - Requesting Witnesses  
Letter to Client - Recommending Against Settlement  
Letter to Client - Recommending For Settlement  
Letter to Client - Trial Date  
Letter to Client - Enclosure - Sign and Return  
Letter to Client - Scheduling Appointment  
Letter to Client - Informational Disclosure - Documents  
Letter to Client - Request for Telephone Conference  
Letter to Client - Non-payment Disengagement  
Letter to Client - Notice of Attorney Lien  
Letter to Client - Recommending Mediation

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#### CLIENT CORRESPONDENCE (continued)

Letter to Client - Availability of ADR  
Letter to Client (shell)

#### INFORMATION GATHERING

Employer's Statement of Lost Wages  
Application for Hospital Records - Superior Court  
Order for Inspection and Copies of Hospital Records (MA Super Ct)  
Letter - Request for Statement from Witness  
Witness Evaluation Form  
Dept Industrial Accidents File Request  
IRS Form 4506 - Request for Copy of Tax Return

#### PHYSICIAN CORRESPONDENCE

Letter to Physician - Requesting Medical Records  
Letter to Physician - Request Info re Duration of Disability, Restrictions  
Letter to Physician - Request Information Regarding Potential Surgery  
Letter to Physician - Request MRI Films, X-Rays, CATS for Review by Expert  
Letter to Physician - Request Final Narrative Report  
Letter to Physician - Request Compromise on Bill  
Letter to Physician - Confirming Zero Balance  
Letter to Physician - Requesting Completion of Report from Insurance Co  
Letter to Military Hospital - Amount of Lien, Request for Records

#### GENERAL CORRESPONDENCE

Letter to Clerk - Enclosure(s) - General  
Letter to Clerk - Complaint  
Letter to Clerk - Return of Service  
Letter to Clerk - Affidavit of Notice re Medical Records  
Letter to Opposing Counsel - Medical Treatises to be Used at Trial  
Letter to Opposing Counsel - Enclosure - General  
Letter to Opposing Counsel - Extending Time to File  
Letter to Opposing Counsel - Intent to Offer Medical Records  
Letter to Deputy Sheriff  
Letter to Witness - Testimony at Trial  
Letter to Witness - Thank You for Testimony  
Letter to US Postal Service - Seeking Forwarding Address (FOIA)

# Westlaw Form Builder – General Practice Massachusetts

## GENERAL CORRESPONDENCE

Letter to Attorney - Referral of Case

## INITIAL PLEADINGS

Civil Action Cover Sheet (MA Super Ct)

Complaint (shell)

Answer

Demand for Jury Trial

Statement of Damages (MA Dist Ct)

Counterclaim

Reply to Counterclaim

Motion for Leave to File Counterclaim

Order on Motion for Leave to File Counterclaim

Motion for Leave to Amend Pleading

Order on Motion for Leave to Amend Pleading

Motion to Strike Pleadings

Order to Strike Pleadings

Motion for More Definite Statement

Order on Motion for More Definite Statement

Motion for Judgment on the Pleadings

Order on Motion for Judgment on the Pleadings

Corporate Disclosure Statement

Uniform Counsel Certification - Alternative Dispute  
Resolution

## SERVICE OF PROCESS, NOTICE

Plaintiffs Motion for Order of Notice by Publication

Order of Notice by Publication

Affidavit of Service by Process Server

Motion to Appoint Constable to Serve Process

Order to Appoint Constable to Serve Process

## INJUNCTION AND RESTRAINING ORDER

Application for Ex Parte Temporary Restraining Order

Motion for Preliminary Injunction

Preliminary Injunction

Motion to Vacate or Modify Preliminary Injunction

Order on Motion to Vacate or Modify

Motion to Extend Temporary Restraining Order

Order on Motion to Extend

## PROCEDURAL MOTIONS

### COURT ISSUES

Entry of Appearance

Motion for Leave to Withdraw as Counsel

Order on Motion to Withdraw as Counsel

Motion to Disqualify Opposing Counsel

Order to Disqualify Attorney

Notice of Withdrawal of Appearance

Motion for Substitution

Order for Substitution of Counsel

Motion for Appointment of Guardian (Settlement of Claim by  
Minor)

Order Appointing Guardian (Settlement of Claim by Minor)

Stipulation for Reference to Master

Objection to Court Appointed Master

Order Appointing Master or Sustaining Objection

Motion for Appointment of Interpreter

Attorney Request for Two Mailing Addresses (MA Super Ct)

Motion for Continuance

Order for Continuance

Motion to Enlarge Time - General

Opposition to Motion to Enlarge Time

Order for Enlargement of Time - general

Suggestion of Bankruptcy

Suggestion of Death

### FORUM CHALLENGES

Motion to Transfer Venue

Order to Transfer Venue

Motion for Change of Venue Based on Local Prejudice

Order for Change of Venue Based on Local Prejudice

Motion to Dismiss - Lack of Personal Jurisdiction

Order on Motion to Dismiss - Lack of Personal Jurisdiction

Motion to Decline Jurisdiction - Forum Non Conveniens

Order on Motion to Decline Jurisdiction - Forum Non  
Conveniens

# Westlaw Form Builder – General Practice Massachusetts

## DISPOSITIVE MOTIONS

Request for Default (MA Super Ct)  
Request for Default (MA Dist Ct)  
Request for Default Judgment (MA Dist Ct)  
Affidavit in Support of Request for Default  
Motion for Default Judgment  
Order for Default Judgment  
Motion for Summary Judgment  
Opposition to Motion for Summary Judgment  
Reply Affidavits and Evidence - Summary Judgment  
Motion to Strike Affidavit - Summary Judgment  
Order for Summary Judgment  
Motion for Entry of Separate and Final Judgment  
Order for Entry of Separate and Final Judgment  
Stipulation of Dismissal - Superior Court  
Stipulation of Dismissal (MA Dist Ct)  
Notice of Voluntary Dismissal - Superior Court  
Notice of Voluntary Dismissal (MA Dist Ct)  
Military Affidavit (MA Super Ct)  
Military Affidavit (MA Dist Ct)

## MOTION PRACTICE

Motion (Shell)  
Letter to Opposing Counsel - Sup Ct Rule 9A Motion  
Letter to Clerk - Sup Ct Rule 9A Package  
List of Documents - Sup Ct Rule 9A Package  
Certificate of Notice of Filing - Sup Ct Rule 9A Package  
Affidavit of Compliance - Sup Ct Rule 9A  
Affidavit of Notice - District Court  
Opposition to Motion (shell)  
Letter to Opposing Counsel - Opposition to Motion  
General Purpose Motion (MA Dist Ct)  
Motion for Reconsideration  
Certificate of Service  
Affidavit - Statement of Proper Service

## MISCELLANEOUS MOTIONS

Motion for Order to File Paper  
Order to File Paper  
Motion to Stay Further Proceedings  
Order to Stay Further Proceedings  
Motion for Speedy Trial  
Order on Motion for Speedy Trial  
Motion to Strike Affidavit

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## MISCELLANEOUS MOTIONS (continued)

Order on Motion to Strike Affidavit  
Motion to Consolidate or Transfer Action  
Order to Consolidate or Transfer Action  
Motion to Sever or for Separate Trial  
Order on Motion to Sever or for Separate Trial  
Motion to Permit Act After Expiration of Period  
Order on Motion to Permit Act  
Motion to Change Track  
Order on Motion to Change Track  
Complaint for Contempt - Non Discovery  
Motion to Dismiss and Answer to Complaint for Contempt

## DISCOVERY

### INTERROGATORIES

Interrogatories - General  
Final Request for Answers to Interrogatories  
Responses and Objections to Interrogatories  
Motion to Enlarge Time - Interrogatories  
Order for Enlargement of Time - Interrogatories  
Motion to Serve Additional Interrogatories  
Order to Serve Additional Interrogatories  
Request for Supplementation of Prior Responses  
Agreement of Parties to Supplement Responses  
Supplementary Response to Interrogatories  
Application for Final Judgment - Failure to Answer Interrogatories

### PRODUCTION OF DOCUMENTS AND TANGIBLE THINGS

Request for Production  
Response and Objections to Requests for Production  
Subpoena Duces Tecum - Nonparty Discovery  
Motion to Compel - Failure to Answer Request for Production  
Order on Motion to Compel - Failure to Answer Request for Production  
Supplementary Response to Requests for Production  
Motion to Compel Further Responses  
Opposition to Motion to Compel Further Responses  
Order on Motion to Compel Further Responses  
Deposition on Written Questions - Custodian of Business Records  
Objections to Form of Written Questions

# Westlaw Form Builder – General Practice Massachusetts

## ADMISSIONS

Requests for Admission  
Response to Requests for Admission  
Motion for Shorter or Longer Time - Requests for Admission  
Order on Motion for Shorter or Longer Time - Requests for Admission  
Motion for Order that Matter Be Deemed Admitted  
Order that Matter Be Deemed Admitted  
Motion to Withdraw or Amend Admission  
Order on Withdrawal or Amendment of Admissions

## INSPECTION AND TESTING

Request for Inspection of Premises  
Response or Objection to Request for Inspection of Premises  
Motion to Compel - Inspection of Premises  
Order on Motion for Inspection of Premises  
Stipulation for Inspection of Premises  
Request to Permit Inspection and Testing of Tangible Things  
Motion to Compel - Inspection and Testing of Tangible Things  
Order on Motion for Inspection and Testing of Tangible Things  
Motion for Destructive Testing  
Order on Motion for Destructive Testing

## EXAMINATION OF PERSON

Motion for Physical Examination  
Order on Motion for Physical Examination  
Motion for Mental Examination  
Order on Motion for Mental Examination  
Stipulation for Examination  
Letter to Client - Instructions Prior to Examination  
Motion for Delivery of Report of Examination  
Order on Motion for Delivery of Report

## DEPOSITIONS

Notice of Taking Deposition  
Deposition Subpoena (Duces Tecum)  
Motion to Quash Deposition  
Order on Motion to Quash Deposition  
Motion for Leave to Take Deposition  
Order on Motion for Leave to Take Deposition  
Motion or Stipulation to Take Deposition by Audio-Visual Means  
Order to Take Deposition by Audio-Visual Means

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## DEPOSITIONS (continued)

Motion to Terminate or Limit Deposition  
Order on Motion to Terminate or Limit Deposition  
Motion to Compel - Witness to Answer Deposition Question  
Order on Motion to Compel - Witness to Answer Deposition Question  
Motion to Resume Taking of Deposition  
Order on Motion to Resume Deposition  
Motion to Enlarge or Shorten Time for Taking Deposition  
Order on Motion to Enlarge or Shorten Time for Taking Deposition  
Application for Letters Rogatory or Deposition Outside State

## PROTECTIVE ORDERS

Motion for Protective Order  
Motion for HIPAA Qualified Protective Order  
Opposition to Motion for Protective Order  
Protective Order  
Motion for Costs and Attorney's Fees in Opposing Protective Order  
Order on Motion for Costs and Attorney's Fees in Opposing Protective Order

## SANCTIONS AND CONTEMPT - DISCOVERY

Motion for Sanctions Under MRCP Rule 37  
Order for Sanctions Under MRCP Rule 37  
Motion for Expenses for Opposing Motion Under MRCP Rule 37  
Order on Motion for Costs Opposing Motion Under MRCP Rule 37  
Motion for Contempt - Discovery  
Order for Contempt - Discovery

## MISCELLANEOUS DISCOVERY

Mandatory Early Disclosure - Standing Order 1-04  
Request for Mandatory Early Disclosure Standing Order 1-04  
Request for Privilege Log  
Privilege Log  
Joint Motion to Preserve the Confidentiality of Discovery Documents  
Joint Motion to Extend Time to Respond to Discovery  
Certificate of Compliance with Superior Court Rule 9C  
Application to Permit the Inspection and Copying of Criminal Records  
Order for Inspection and Copying of Criminal Records

# Westlaw Form Builder – General Practice Massachusetts

## DISCOVERY CORRESPONDENCE

Letter to Client - Discovery to Answer  
Letter to Client - Notify of Deposition & Instructions  
Letter to Client - Review, Correct and Sign Deposition  
Letter to Client - Deposition of Adverse Party or Other Witness  
Letter to Opposing Counsel - Reminder to Furnish Discovery  
Letter to Opposing Counsel - Prior to Motion to Compel  
Letter to Opposing Counsel - Review, Correct and Sign Deposition  
Letter to Opposing Counsel - Returning Deposition Errata Sheet

## DISCOVERY CORRESPONDENCE (continued)

Letter to Court Reporter - Schedule Deposition  
Letter to Court Reporter - Returning Deposition Errata Sheet  
Letter to Audio-Visual Operator - Set up Deposition  
Letter to Deponent - Review, Correct and Sign Deposition

## EXPERT WITNESSES

Letter - Expert Witness - Initial Contact  
Letter - Expert Witness - Preparation for Deposition or Trial Testimony  
Expert Interrogatories  
Request for Production Regarding Experts  
Motion for Deposition of Expert  
Order for Expert Deposition  
Motion to Exclude Expert Witness (Daubert-Lanigan)  
Order to Exclude Expert Witness (Daubert-Lanigan)

## ALTERNATIVE DISPUTE RESOLUTION

Demand for Arbitration  
Application to Compel Arbitration  
Motion to Dismiss Application to Compel Arbitration  
Agreement for Binding Arbitration (MA Super Ct)  
Joint Motion to Refer to Mediation  
Application for Appointment of Arbitrator  
Motion to Correct and Modify Award  
Order to Correct and Modify Award

## TRIAL FILINGS AND MOTIONS

### GENERAL TRIAL

Motion for Pre-Trial Conference  
Order on Motion for Pre-Trial Conference  
Certificate of Readiness for Trial  
Joint Pre-trial Memorandum  
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## GENERAL TRIAL (continued)

Waiver of Jury Trial  
Stipulation for Trial by Court  
Certification - Records of Regularly Conducted Business Activity  
Stipulations of Fact  
Motion in Limine, with Order  
Motion in Limine - Use of Criminal Records for Impeachment, with Order  
Trial Subpoena (Duces Tecum)  
Motion to Take Judicial Notice  
Order to Take Judicial Notice  
Motion to Preclude Witness  
Order to Preclude Witness  
Motion for Mistrial  
Order on Motion for Mistrial  
Motion to Use Deposition of an Aged, Infirm or Sick Witness  
Order to Use Deposition of an Aged, Infirm or Sick Witness  
Motion to Admit Audio-Visual Evidence  
Order to Admit Audio-Visual Evidence  
Motion to Confirm and Adopt Report  
Order to Confirm and Adopt Report  
Motion of Attorney for Leave to Testify  
Order for Attorney Leave to Testify  
Motion to Permit Additional Attorney to Examine Witnesses  
Order on Motion to Permit Additional Attorney to Examine Witnesses  
Objections to Proposed Findings of Fact and Conclusions of Law  
Motion for Directed Verdict

## JURY

Motion to Permit Jury to Take Notes, with Order  
Motion to Permit Jury to View Premises, with Order  
Motion to Prevent Improper Voir Dire, with Order  
Motion to Restore to Trial List, with Order  
Motion to Submit Juror Questionnaire, with Order  
Request for Jury Instructions  
Objections to Requests for Instructions  
Demand for Submission of Omitted Issues  
Motion to Frame Issues of Fact for Jury, with Order

# Westlaw Form Builder – General Practice Massachusetts

## SETTLEMENT

Offer of Judgment  
Notice of Acceptance of Offer of Judgment  
Letter to Opposing Counsel - Settlement Offer  
Letter to Opposing Counsel - Acceptance of Settlement Offer  
Letter to Opposing Counsel - Rejection of Settlement Offer with Counter  
Agreement for Judgment  
Settlement Agreement  
Release (Mutual or Unilateral)  
Disbursal Statement - Settlement Funds  
Letter to Client - Transmitting Final Payout

## POST TRIAL

Motion for Attorney Fees and Costs  
Order on Motion for Attorney Fees and Costs  
Request for Findings of Fact and Rulings of Law - District Court  
Motion for New Trial  
Opposition to Motion for New Trial  
Order for New Trial  
Remittitur or Additur  
Motion by Losing Party for Amended and Additional Findings of Fact  
Motion for Relief from Judgment or Order  
Order for Relief from Judgment  
Motion to Remove Default  
Order on Motion to Remove Default  
Motion for Judgment Notwithstanding the Verdict or for New Trial  
Order for Judgment  
Motion to Correct Clerical Error  
Order to Correct Clerical Error  
Motion to Vacate Default Judgment  
Order to Vacate Default Judgment

## MOTOR VEHICLE

### CORRESPONDENCE - MOTOR VEHICLE

Letter to Local Police - Accident Report  
Damage Evaluation for Insurance Adjuster from Attorney  
Letter to Insurer - Client's Disability  
Letter to Insurer - Medical Bills  
Letter to Insurer - Notice of Claim  
Letter to Insurer - Initial Contact, No-Fault Application  
Letter to Insurer - Examination Under Oath (EUO), Parameters  
Letter to Insurer - Case Update and Requesting Policy Limits  
Letter to Insurer - Prescriptions Claim  
Letter to Insurer - Requesting Payment to Medical Providers  
Letter to Insurer - Sending Wage and Salary Verification  
Letter to Insurer - Demand  
Letter to Insurer - Confirming Settlement  
Letter to Insurer - Enclosing Release

### ARBITRATION - MOTOR VEHICLE

Demand for Arbitration - Uninsured Motorist  
Complaint to Compel Arbitration - Uninsured Motorist  
Motion to Dismiss or Answer Complaint for Arbitration - Uninsured Motorist

### PLEADING - MOTOR VEHICLE

Complaint - Vehicle Accident  
Complaint - Failure to Pay No-Fault Benefits

### DISCOVERY - MOTOR VEHICLE

Interrogatories - Motor Vehicle Accident - Driver of Other Vehicle  
Requests for Production - Motor Vehicle Accident - Driver of other vehicle  
Request for Admissions - Motor Vehicle Accident - Driver of other vehicle  
Interrogatories - Motor Vehicle Accident - Insurance Adjuster  
Requests for Production - Motor Vehicle Accident - Insurance Adjuster

# Westlaw Form Builder – General Practice Massachusetts

## COLLECTIONS

Demand Letter  
UCC-1 - UCC Financing Statement  
UCC-1Ad - Financing Statement Addendum  
Complaint - To Recover Money Owed  
Motion for Attachment  
Order for Attachment  
Motion to Dissolve or Reduce Attachment  
Order to Dissolve or Reduce Attachment  
Motion for Trustee Process  
Order for Trustee Process  
Motion to Dissolve or Reduce Trustee Process  
Order to Dissolve or Reduce Trustee Process  
Application for Writ of Execution - Property  
Application for Writ of Execution - Money  
Application for Supplementary Process  
Acknowledgment of Satisfaction of Judgment (MA Dist Ct)  
Proof of Claim  
Interrogatories of Plaintiff in Aid of Execution

## MASSACHUSETTS PROBATE

### CLIENT MATTERS AND GENERAL CORRESPONDENCE

Client Information Form  
Letter to Client - Transmittal  
Letter to Interested Party - Transmittal  
Letter to Interested Party - Opening of Probate and Notice  
Letter to Interested Party - Notice of Disclaimer Rights  
Letter to Bank to Requesting Account Balances  
Letter to Broker to Verify Balances and Values  
Letter to Creditor to Verify Account Balance  
Letter to Creditor of Defective Claim  
Letter to IRS to Verify Prior Gift Tax Returns  
Letter to Public Administrator re Initiation of Administration  
Letter to Request Death Record  
Application for Copy of Death Record - Dept of Health and  
Human Services  
Letter to Attorney General

## PROBATE OF WILL

### TESTATE PROCEEDINGS

Petition for Delivery of Will to Probate Register  
Probate of Will (CJ-P 2)  
Allowance of Foreign Will (CJ-P 6)  
Voluntary Executor - Executrix Statement (CJ-P7A)  
Affidavit of Witness to Will (AC 61)  
Citation - Probate of Will  
Affidavit of Notice to devisees and Legatees (CJ-P 14B)  
Motion - Appointment of Temporary Executor  
Decree - Motion for Appointment of Temporary Executor  
Affidavit of Solvency of Estate - Temporary Executor  
Petition to Take Deposition of Witness to Will (AC 59)  
Deposition of Witness to Will (AC 60)  
Notice of Deposition  
Declination (AC 71)  
Petition for Probate of a Lost Will  
WILL CONTROVERSY  
Notice of Appearance  
Affidavit of Objections to Will  
Petition for Compromise of Controversy Over Will (AC 64)  
Compromise of Controversy Over Will - Decree (AC 65)  
Motion - Declaration of Rights to Real Estate Devised by Will  
Decree - Declaration of Rights to Real Estate Devised by Will

### ADMINISTRATION WITH WILL ANNEXED

Administration With Will Annexed (CJ-P 3)  
Administration De Bonis Non With Will Annexed (CJ-P 4)  
Motion - Appointment of Temporary Administrator with Will  
Annexed  
Decree - Motion for Appointment of Temp Administrator  
With Will Annexed  
Affidavit of Solvency of Estate - Temporary Administrator  
With Will Annexed

## INTESTATE ADMINISTRATION

### INTESTATE PROCEEDINGS

Petition for Administration (CJ-P 1)  
Petition for Administration De Bonis Non (CJ-P 5)  
Voluntary Administration Statement (CJ-P7)  
Public Administration (CJ-P 9)  
Citation - Petition for Administration  
Petition for Distribution - Intestate Estate (AC 50)

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## **SPECIAL ADMINISTRATION**

Special Administration (CJ-P 8)  
Petition for Leave to Pay Debts by Special Administrator (AC 56)  
Petition of Special Administrator to Sell Personal Property Decree - Special Administrator to Sell Personal Property

## **ADDITIONAL COURT FILINGS**

### **BONDS**

Fiduciary Bond [CJ-P 26]  
Petition for Discharge of Surety on Bond (AC 32)  
Petition for Leave to Bring Suit on Fiduciary Bond (AC 33)  
Petition for Reduction of Bond (AC 144)  
Petition for New Bond (AC 31)

### **MANAGEMENT OF ESTATE**

Appearance (CJ-P 126)  
Citation - Notice (CJ-P 14)  
Appointment of Agent (CJ-P 17)  
General Assent and Release of All Demands and Assent to Account (CJ-P 21)  
Affidavit (CJ-P 151)  
Military Affidavit (CJ-P 148)  
Appointment of Attorney - Military (AC 155)  
Notice of Withdrawal of Attorney Appearance  
Petition - General (AC 116)  
Petition for Discovery (AC 69)  
Appointment and Report of Guardian Ad Litem  
Certificate of Services - Guardian Ad Litem  
Motion to Waive Appointment of Guardian Ad Litem  
Decree - Waiver of Appointment of Guardian Ad Litem  
Resignation of Fiduciary (AC 74)  
Motion - General (CJ-D 400)  
Complaint - Contempt for Failure to Render Account (CJ-D 103)

### **SPOUSAL RIGHTS**

Waiver of Will (CJ-P 66)  
Assignment of Dower (AC 103)  
Petition for Surviving Spouse's Allowance (AC 70)

## **MISCELLANEOUS FILINGS**

Petition for Removal of Fiduciary (AC 73)  
Uniform Counsel Certification Form  
Affidavit of Domicile - Estate  
Return of Service - General  
Notice of Limited Appearance  
Notice of Withdrawal of Limited Appearance

## **ASSETS AND LIABILITIES OF ESTATE**

### **INVENTORY AND APPRAISAL**

Inventory (CJ-P 41)  
Determination of Value (AC 106)  
Petition and Order to Render Inventory - Account (CJ-P 68)  
Petition for Revocation of Warrant for Appraisal & New Warrant (AC 37)  
Submission Agreement by Children - Division of Estate  
Affidavit of Correction of Real Estate in Inventory  
Affidavit of Omission of Real Estate from Inventory

## **PROPERTY**

### **REAL PROPERTY**

Petition for Sale - Real Estate Debts, Legacies, Charges (CJ-P 75)  
Petition for Sale - Real Estate (CJ-P 76)  
Sale - Real Estate (CJ-P 143)  
Petition for Sale - Real Estate - Guardian Ad Litem - Maintenance (AC 78)  
Petition for Sale - Real Estate - Guardian Ad Litem - Investment (AC 79)  
Petition for Partition and Sale - Real Estate (AC 92)  
Partition - Sale - Real Estate - Citation (AC 93)  
Partition - Sale - Real Estate - Affidavit Filing Notice in Regis of Deeds (AC 95)  
Partition - Sale - Real Estate - Appointment to Represent Party (AC 96)  
Petition for Mortgage - Real Estate (AC 88)  
Petition for Mortgage - Real Estate - Guardian Ad Litem (AC 89)  
Petition for Lease - Real Estate - Guardian Ad Litem (AC 91)  
Affidavit of Notice of Sale by Publication (AC 98)  
Assent and Release - Sale of Property  
Deed by Executor - Administrator - Other Fiduciary  
Receipt of Property



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## PERSONAL PROPERTY

Sale - Personal Estate (AC 84)  
Sale - Receipt of Personal Estate By Foreign Fiduciary (AC 85)

## MISCELLANEOUS PROPERTY

Petition for Leave to Carry on Business (AC 57)  
Disclaimer of Interest in Property  
MA Resident Estate Tax Return (M-706)  
Application for Extension of Time to File MA Estate Return (M-4768)  
MA Non-resident Decedent Affidavit (M-NRA)  
Application for Certificate Releasing MA Estate Tax Lien (M-4422)  
Certificate Releasing MA Estate Tax Lien (M-792)  
Affidavit Regarding Necessity of Federal Estate Tax Filing

## CLAIMS AGAINST THE ESTATE

Notice of Claim (AC 102)  
Representation of Insolvency - Petition for Appointment of Commiss (AC 42)  
Representation of Insolvency - Petition for Exam of Claims by Court (AC 46)  
Claim (AC 46A)  
Order to Admin - Exec of Insolvent Estate to Notify Cred - Present Claim (AC 47)  
Insolvency - List of Claims (AC 48)  
Warrant to Commissioners and Report (AC 43)

## PAYMENT BY ESTATE

Petition for Distribution - Legacies (AC 53)  
Petition for Leave to Deposit Funds for Benefit of Minor (AC 54)  
Petition for Payment of Funds Deposited for Benefit of Minor (AC 55)

## ACCOUNTS AND COMPENSATION

### ACCOUNTS

Account Schedules A - C  
Account (CJ-P 30)  
Guardian Ad Litem - Account (AC 120)  
Notice of Fiduciary's Account (CJ-P 39)  
Motion for Citation to be Issued on Account  
Objection to Account  
Motion to Strike Objection - Appearance to Account  
Judgment to Allow Account (CJ-P 38)

### COMPENSATION AND FEES

Petition for Counsel Fees (AC 141)  
Determination Regarding Fees and Cost  
Statement of Payment (CJ-P 128)

## MASSACHUSETTS REAL ESTATE

### CLIENT MATTERS AND GENERAL

#### CORRESPONDENCE

Client Information Form  
Letter Confirming Appointment with Directions to Office  
Letter of Engagement  
Letter to Avoid Conflicts of Interest  
Letter Advising of Representation of Other Interested Party  
Letter Declining Representation  
Letter Terminating Representation  
Letter at Conclusion of Representation  
Letter to Client - General  
Letter to Current Mortgagee - General  
Letter to Current Mortgagee Requesting Payoff Information  
Letter to Current Mortgagee Enclosing Payoff Check  
Letter to New Lender - General  
Letter to New Lender re Preference for Taking Title  
Letter to Purchaser - General  
Letter to Seller - General  
Letter to Title Company re Title Examination  
Notice - Real Estate Taxes (REBA No 8)

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## CHECKLISTS

Checklist for Attorney for Purchaser  
Conventional Loan Checklist

## PROPERTY TRANSFERS

### PURCHASE AND SALE AGREEMENTS

Offer to Purchase Real Estate (REBA No 9)  
Purchase and Sale Agreement for Massachusetts Real Estate  
(REBA No 21)  
Purchase and Sale Agreement - Commercial  
Purchase and Sale Agreement - Unimproved Land

### RIDERS AND ADDENDA TO PURCHASE AND SALE AGREEMENTS

Mass Dept of Public Health Property Transfer Lead Paint  
Notification  
Lead Paint Rider (REBA No 9A)  
Condominium Rider to Purchase and Sale Agreement (REBA  
No 21A)  
Septic System Inspection Rider (the 'Basic Agreement') (REBA  
No 21B)  
Alternative Dispute Resolution Rider (REBA No 21C)  
Use and Occupancy Agreement - Pre-closing - by Buyer  
Use and Occupancy Agreement - Post-closing - by Seller  
Addendum for Short Sale  
Addendum for Sale of other Property by Buyer  
Addendum for Sellers Continued Marketing of Property  
Termination of Purchase and Sale Agreement

## DEEDS

Deed - Quitclaim  
Deed - Warranty  
Deed - Confirmatory (Correction Deed)  
Deed - by Executor, Administrator or other Fiduciary  
Deed in Lieu of Foreclosure  
Foreclosure Deed (REBA No 24)  
Condominium Master Deed  
Condominium Unit Deed  
Residential Condominium Unit Deed (REBA No 22)

## BILLS OF SALE

Bill of Sale - Broad Form  
Bill of Sale - Specific Items  
Assignment of Warranties and Service Contracts

## ESCROW

Escrow Agreement for Simple Issues  
Escrow Agreement (REBA No 33)  
Agreement for Delivery of Deed in Escrow  
Escrow Agreement - Title 5 Compliance - Septic System  
Authorization to Release Escrowed Funds  
Initial Escrow Account Disclosure Statement

## EASEMENTS

Access Easements  
Conservation Easement  
Landscape and View Easement  
Utilities Easement  
Reciprocal Easement

## LENDING

### FNMA NOTES

Multistate Fixed Rate Note (FNMA 3200)  
Balloon Fixed Rate Note (FNMA 3260)  
Adjustable Rate Note - ARM 5-2 (FNMA 3502)

### OTHER NOTES AND RELATED DOCUMENTS

Promissory Note - Short Form  
Promissory Note - Commercial Real Estate  
Promissory Note - Amended and Restated  
Promissory Note - Amendment to Note  
Guaranty of Borrower's Obligations

### FNMA MORTGAGES AND RIDERS

Mortgage (FNMA 3022)  
Rider - Adjustable Rate - ARM 5-1 (FNMA 3108)  
Rider - Convertible Adjustable Rate (FNMA 3118)  
Rider - Condominium (FNMA 3140)  
Rider - Planned Unit Development (PUD) (FNMA 3150)  
Rider - 1-4 Family and Assignment of Rents (FNMA 3170)  
Rider - Bi-weekly Payments - Fixed Rate (FNMA 3177)  
Addendum - Balloon Note (FNMA 3266)  
Rider - Second Home (FNMA 3890)

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## OTHER MORTGAGES

Mortgage - Statutory Form  
Mortgage and Security Agreement  
Mortgage, Security Agreement and Assignment

## SECURITY AGREEMENTS

Security Agreement  
Security Agreement Supplemental to Real Estate Mortgage  
Security Agreement - Transfer of Title to Secure Debt

## COLLATERAL LENDING FORMS

Pre-Affixation Agreement between Secured Party and Mortgagee  
Subordination by Owner or Mortgagee to Security Interest in Fixtures  
Assignment of Mortgage  
Discharge of Mortgage  
Discharge of Mortgage, Assignment of Leases & Rents & UCC Statements  
Release Deed  
Partial Release of Mortgage  
Extension of Mortgage  
Subordination Agreement - Second Mortgage to First Mortgage  
Subordination of Mortgage (REBA No 12)  
Affidavit - Owner Occupancy

## UCC FORMS

UCC-1 - UCC Financing Statement  
UCC-1Ad - Financing Statement Addendum  
UCC-3 - Financing Statement Amendment  
UCC-3Ad - Financing Statement Amendment Addendum  
UCC-5 - Statement of Claim  
UCC-11 - UCC Information Request

## HUD-1 FORMS

HUD-1 Settlement Statement  
HUD-1 - Borrower Information Only  
HUD-1 - Seller Information Only  
HUD-1A - Settlement Statement for Transactions without Sellers

## TRUTH IN LENDING DOCUMENTS

Truth-In-Lending (Sale) Disclosure Statement  
Truth-In-Lending (Loan) Disclosure Statement  
Truth-In-Lending Notice of Right to Cancel - General  
Truth-In-Lending Notice of Right to Cancel - Refinance  
Amount Financed Itemization

## DEFAULTS

### PRELIMINARY FORECLOSURE FORMS

Mortgagor's Estoppel Certificate - Deed in Lieu of Foreclosure  
Notice - Intent to Foreclose and of 90 day Right to Reinstate  
Affidavit - Compliance with MGL c 244 Sec 35A  
Notice - Intention to Foreclose  
Notice - Intention to Foreclose and of Deficiency  
Certificate of Entry (REBA No 23)  
Memorandum of Sale  
Affidavit - Mortgage Foreclosure - Appraisal and Advertising (Ruebeck)

## CONDOMINIUM NOTICES

Notice - Intention to Collect Rents  
Notice - Tenant to Pay Rent Directly to Condo Assn  
Notice - Intent to Institute Action - 30 day letter  
Notice - Delinquency of Unit Owner - 60 day letter

## CONSTRUCTION

### CONSTRUCTION LENDING

Multistate Construction Contract (FNMA 3734)  
Multistate Construction Loan Agreement (FNMA 3735)

## MECHANICS LIENS

Notice of Contract with Owner under MGL c 254 Sec 2  
Notice of Contract with Contractor or Subcontractor  
Statement of Amount Due under MGL c 254 Sec 8  
Notice of Identification by Subcontractor under MGL c 254 Sec 4  
Notice of Substantial Completion under MGL c 254 Sec 2A  
Notice of Termination under MGL c 254 Sec 2B  
Partial Waiver and Subordination of Lien  
Notice of Dissolution of Lien under MGL c 254 Sec 10

# Westlaw Form Builder – General Practice Massachusetts

## LEASING

### LEASES

Lease - Residential - Single Family Dwelling  
Lease - Residential - Apartment  
Lease - Commercial  
Lease - Ground Lease  
REBA Short Form Office Lease (REBA No 38)  
Short Form Office Lease Schedule 1 - Option to Extend (REBA No 38A)  
Short Form Office Lease Work Letter (REBA No 38B)

### SUBLEASES

Sublease  
Assignment by Lessee and Assumption

### COLLATERAL LEASING DOCUMENTS

Guaranty of Tenants Obligations  
Assignment of Lease  
Assignment of Leases and Rents  
Recognition and Non-disturbance Agreement between Mortgagee and Tenant  
Subordination, Non-disturbance and Attornment Agreement (FNMA 4510SF)  
Subordination of Lease (REBA No 13)  
Notice of Lease  
Affidavit - Compliance with Right of First Refusal  
Lead Based Paint Disclosure for Leases

## LAND COURT

### LAND COURT FORMS

Civil Cover Sheet  
Petition for New Certificate after Death  
Petition for Partition  
Petition to Amend Certificate of Title  
Petition to Amend Certificate of Title by Expunging Mortgage  
Petition for Approval of a Plan  
Complaint for Voluntary Withdrawal  
Notice - Voluntary Withdrawal of Land from Registration System  
Motion for General Default

## ADDITIONAL LAND COURT PROCEDURAL FORMS

Appointment of Resident Agent in Land Court  
Appointment and Report of Guardian Ad Litem  
Order - Notice to Attorney General  
Order - Notice to Municipality  
Reference to Examiner  
Attorney's Certificate for Amendatory Mortgages (1-4 Family Residential)

## MORTGAGE DISCHARGE

Payoff Request Letter (REBA No 40)  
Affidavit of Mortgagors in Support of Discharge of Mortgage (REBA No 15C)  
Affidavit of Subsequent Owners in Support of Discharge of Mortgage (REBA No 15D)  
Affidavit of Attorney Supporting Discharge by Servicer (REBA No 15E)  
Discharge by Note Holder under MGL c 183 Sec 54(c)(B) (REBA No 15F)  
Discharge of Mortgage by Attorney's Affidavit (REBA No 15G)  
Discharge of Mortgage by Closing Attorney's Affidavit (REBA No 41A)  
Payoff Transmittal & Notice of Intent to Record Aff of Discharge (REBA No 41B)  
Notice to Mortgagee of Intent to Record Aff of Discharge (REBA No 41C)  
Affidavit to Record Unacknowledged or Incomplete Discharge (REBA No 42)  
Demand Letter to Mortgagee, etc, for Discharge Documents, etc (REBA No 43A)  
Aff for Recording Mortgage Servicer Authority Documents (REBA No 43B)  
Aff for Recording Note to Support Discharge by Note Holder (REBA No 43C)  
Aff by Mortgagor Re Discharge by Servicer or Note Holder (REBA No 43D)  
Affidavit to Record Paid note - MGL c 183 Sec 55(h) (REBA No 44)  
Demand Letter to Person Who Rcvd & Failed to Record Discharge (REBA No 45)  
Demand Letter to Mortgagee or Holder for Discharge & Damages (REBA No 46A)  
Demand Letter to Mortgagee for Discharge, Documents & Fees (REBA No 46B)

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## **MORTGAGE DISCHARGE (continued)**

Attorney's Affidavit of Discharge - MGL c 183 Sec 55(g)(1) (REBA No 46C)  
Notice of Intention to Record Affidavit of Discharge (REBA No 46D)  
Notice to Mortgagee of Intent to Record Affidavit of Discharge after Payoff (REBA No 46E)  
Aff of Attorney Re Circumstances of Payoff without Objections (REBA No 46F)  
Demand Letter to Mortgagee or other Holder to Reimburse Fees (REBA No 47)

## **MISCELLANEOUS**

### **TITLE AND CLOSING AFFIDAVITS**

Affidavit - Names - One and the Same Person  
Affidavit - Discharge of Recorded Mortgage  
Discharge of Attachment  
Certificate of No Unpaid Expenses - Condominium  
Affidavit - Estate Tax - MGL c 65C, Sec 14(a) (REBA No 32)  
Affidavit - FIRPTA - Non-foreign seller - Individual  
Certification by Entity Transferor (REBA No 6)  
Affidavit - Title Insurance  
Affidavit - Title Insurance (REBA No 5)  
Agreement - Smoke Detector Certification (REBA No 7)  
Affidavit - Resolving Title Issues  
Affidavit - No Divorce  
Certificate of Trustee of Non-Testamentary Trust  
Fire Insurance Memorandum  
Notice - Lead Paint

### **AGREEMENTS**

Agreement - Boundary Lines  
Agreement - Correction of Errors  
Agreement - Condominium Real Estate Taxes  
Agreement - Confidentiality  
Stipulation of Municipal Charges  
Agreement - Real Estate Tax Reapportionment  
Agreement to Subordinate Homestead to Mortgage  
Agreement - Oil and Hazardous Materials Indemnification  
Election of Tenants by the Entirety (REBA No 18)

## **ATTORNEY CLOSING FORMS**

Closing Attorney Privacy Policy  
Attorney's Certificate of Title  
Attorney's Homeowner's Insurance Memorandum  
Attorney's Opinion Letter - Borrower's and Guarantor's Counsel  
Form of Opinion (REBA No 39)  
Affidavit under MGL c 183 Sec 5B (REBA No 4)  
Aff under MGL c 183 Sec 5B (With Subjoined Attorney's Aff) (REBA No 4A)  
Attorney Cert re Internet-Based Title Information Services (REBA No 56)

## **ENTITY RESOLUTIONS**

Certificate of Resolutions (For-profit Corporation)  
Certificate of Resolutions (Non-profit Corporation)  
Certificate of Resolutions (LLC)  
Certificate of Resolutions (General Partnership)  
Certificate of Resolutions (Limited Partnership)

## **OTHER**

Durable Power of Attorney  
Affidavit Regarding Power of Attorney (REBA No 1)  
General Power of Attorney for Representing Seller (REBA No 10)  
Limited Power of Attorney for Representing Seller at Closing (REBA No 11)  
Certification for Use with Form 11 (REBA No 11A)  
Buyer's Limited Power of Attorney (REBA No 28)  
Declaration of Homestead (REBA No 16)  
Declaration of Homestead Elderly or Disabled Person (REBA No 17)  
Release of Declaration of Homestead (REBA No 34)  
Affidavit - Adverse Possession  
Revocable License to Stop Adverse Possession  
App for Certificate Releasing Massachusetts Estate Tax (M-4422)  
Massachusetts Non-resident Decedent Affidavit (M-NRA)  
Certificate Releasing Massachusetts Estate Tax Lien (M-792)  
Authorization to Release Records (Release of Information)

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## MASSACHUSETTS SMALL ESTATE WILLS

### CLIENT MATTERS AND GENERAL CORRESPONDENCE

#### CLIENT INTAKE

Client Information Form  
Consent to Joint Representation

#### LETTERS

Letter to Client - Confirming Initial Conference  
Letter to Client - Transmitting Drafts of Estate Planning Documents  
Letter to Client - Confirming Conference to Execute Documents  
Letter to Client - Transmitting Original or Copy of Executed Documents  
Letter to Individual Trustee - Transmitting Copy of Executed Documents  
Closing Agenda

### SPOUSE A'S ESTATE PLANNING DOCUMENTS

Simple Will - Spouse A  
Pour-over Will - Spouse A  
Revocable Living Trust - Spouse A  
Trustee's Certificate - Spouse A  
Codicil to Last Will and Testament - Spouse A  
Durable Power of Attorney - General - Spouse A  
Durable Power of Attorney - Limited - Spouse A  
Revocation of Power of Attorney - Spouse A  
Health Care Proxy - Spouse A  
Revocation of Health Care Proxy - Spouse A  
HIPAA Release - Spouse A  
Document of Anatomical Gift - Spouse A  
Living Will - Spouse A  
Life Insurance Beneficiary Form - Spouse A

### SPOUSE B'S ESTATE PLANNING DOCUMENTS

Simple Will - Spouse B  
Pour-over Will - Spouse B  
Revocable Living Trust - Spouse B  
Trustee's Certificate - Spouse B  
Codicil to Last Will and Testament - Spouse B  
Durable Power of Attorney - General - Spouse B  
Durable Power of Attorney - Limited - Spouse B  
Revocation of Power of Attorney - Spouse B  
Health Care Proxy - Spouse B  
Revocation of Health Care Proxy - Spouse B  
HIPAA Release - Spouse B  
Document of Anatomical Gift - Spouse B  
Living Will - Spouse B  
Life Insurance Beneficiary Form - Spouse B

### JOINT GRANTORS' TRUST DOCUMENTS

Revocable Living Trust - Joint Grantors  
Trustee's Certificate - Joint Grantors

### INDIVIDUAL'S ESTATE PLANNING DOCUMENTS

Simple Will - Individual  
Pour-over Will - Individual  
Revocable Living Trust - Individual  
Trustee's Certificate - Individual  
Codicil to Last Will and Testament - Individual  
Durable Power of Attorney - General - Individual  
Durable Power of Attorney - Limited - Individual  
Revocation of Power of Attorney - Individual  
Health Care Proxy - Individual  
Revocation of Health Care Proxy - Individual  
HIPAA Release - Individual  
Document of Anatomical Gift - Individual  
Living Will - Individual  
Life Insurance Beneficiary Form - Individual

### MINOR CHILDREN DOCUMENTS

Health Care Proxy - Minor  
HIPAA Release - Minor  
Appointment of Temporary Agent for Care - Minor  
Appointment of Guardian - Minor

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## **NOMINEE TRUST DOCUMENTS**

Declaration of Trust Establishing Nominee Trust (REBA No 20)

Nominee Trust Schedule of Beneficiaries (REBA No 20A)

Receipt of Schedule of Beneficiaries (REBA No 20B)

Nominee Trust Resignation (REBA No 20C)

Nominee Trust Appointment of Successor Trustee (REBA No 20D)

Certificate of Acceptance by Trustee (REBA No 20E)

Nominee Trust Certificate of Appointment of Successor Trustee (REBA No 20F)

Trustee Certificate (REBA No 20G)

Certificate and Direction of Beneficiary (REBA No 20H)