

The Orange Book
**COLORADO ESTATE
PLANNING FORMS**

SIXTH EDITION



ESTATE PLANNING FORMS COMMITTEE
of the CBA Trust & Estate Section

Supplemented

- 2005 •
- 2006 •
- 2007 •
- 2009 •

CONTINUING LEGAL EDUCATION IN COLORADO, INC.
COLORADO BAR ASSOCIATION • DENVER BAR ASSOCIATION

TABLE OF CONTENTS

Publisher's Note	iii
Dedication	vi
Estate Planning Forms Committee	vii
Table of Contents	ix
Introduction	INT-1
Warning Regarding Recent Tax Changes (2004)	INT-3

Colorado Estate Planning Forms

Form 1:	General Durable Power of Attorney
Form 2:	Parent's or Guardian's Delegation of Powers
Form 3:	Appointment of Guardian by Signed Writing
Form 4:	Medical Durable Power of Attorney
Form 5:	Declaration as to Medical or Surgical Treatment
Form 6A:	Nontrust Will
Form 6B:	Nontrust Will — Single with Children
Form 7A:	Will with Contingent Trust
Form 7B:	Will with Contingent Trust — Single with Children
Form 8:	Disclaimer Will
Form 9:	Marital Deduction Will
Form 10:	Pourover Will
Form 11:	Codicil
Form 12:	Memorandum Distributing Tangible Personal Property
Form 13A:	Revocable Marital Deduction Trust
Form 13B:	Short Form Joint Revocable Trust
Form 14:	Trust Amendment
Form 15:	Section 2503(c) Trust
Form 16:	Revocable Disclaimer Trust
Form 17:	Single Life Irrevocable Life Insurance Trust
Form 18:	Short Form Management Trust
Form 19:	Joint Lives Irrevocable Life Insurance Trust
Form 20:	Disposition of Last Remains
Form 21:	Deeds to Trusts
Form 21A:	General Warrant Deed to Trust
Form 21B:	Special Warranty Deed to Trust
Form 21C:	Bargain and Sale Deed to Trust
Form 22:	Estate Planning Questionnaire
Form 23:	Non-Tax Planning Revocable Trust

The Orange Book

Form 24: Community Property Agreement
Tab A: General and Administrative Provisions
Tab B: Special Provisions
Tab C: Engagement Letter
Tab D: Gifting
Tab E: Proposed Framework for Generation-Skipping Transfer Tax
Tab F: Life Insurance Beneficiary Designation Sample Language
Tab G: *Orange Book Handbook* Table of Contents