

The more than 465 automated forms in this volume are designed to be the cornerstone of an estate planning practice. Lipman's Wills & Trusts is sophisticated enough for any high-end estate planning project, yet simple and flexible enough to handle smaller estates as well. The forms in this volume cover all aspects of estate planning, including the preparation of wills, living trusts, powers of attorney, medical powers of attorney, HIPAA releases, directives to physicians, irrevocable trusts, buy-sell agreements, and even pre- & post-marital property agreements.

WILLS

HUSBAND'S WILLS

- 1-101 Will - Simple - outright to beneficiaries
- 1-102 Will - Simple - with separate share trusts
- 1-103 Will - Pourover - short version
- 1-104 Will - Pourover - long version
- 1-105 Will - Bypass Trust only - no marital trust
- 1-106 Will - Bypass &/or QTIP
- 1-107 Will - Bypass &/or QTIP with separate share trusts
- 1-108 Will - Bypass & QTIP with GST exempt trusts
- 1-109 Will - Bypass & QTIP with GST exempt & nonexempt trusts

WIFE'S WILLS

- 1-201 Will - Simple - outright to beneficiaries
- 1-202 Will - Simple - with separate share trusts
- 1-203 Will - Pourover - short version
- 1-204 Will - Pourover - long version
- 1-205 Will - Bypass Trust only - no marital trust
- 1-206 Will - Bypass &/or QTIP
- 1-207 Will - Bypass &/or QTIP with separate share trusts
- 1-208 Will - Bypass & QTIP with GST exempt trusts
- 1-209 Will - Bypass & QTIP with GST exempt & nonexempt trusts

INDIVIDUAL'S WILLS

- 1-301 Will - Simple
- 1-302 Will - Pourover - short version
- 1-303 Will - Pourover - long version
- 1-304 Will - Family / Pooled Trust
- 1-305 Will - Separate Share Trusts
- 1-306 Will - Separate Share Trusts - GST exempt trusts only
- 1-307 Will - Separate Share GST exempt & nonexempt trusts

SAME-SEX SPOUSE / DOMESTIC PARTNER #1 WILLS

- 1-401 Will - Simple
- 1-402 Will - Pourover - short version
- 1-403 Will - Pourover - long version
- 1-404 Will - Trust for spouse / partner, then sep share trusts
- 1-405 Will - Separate Share Trusts for one or more benefs

SAME-SEX SPOUSE / DOMESTIC PARTNER #2 WILLS

- 1-501 Will - Simple
- 1-502 Will - Pourover - short version
- 1-503 Will - Pourover - long version
- 1-504 Will - Trust for spouse / partner, then sep share trusts
- 1-505 Will - Separate Share Trusts for one or more benefs

CODICILS

- 2-101 Codicil (Husband)
- 2-102 Codicil (Wife)
- 2-103 Codicil (Indiv)
- 2-104 Codicil (Spouse / DP #1)
- 2-105 Codicil (Spouse / DP #2)

REVOCABLE LIVING TRUSTS

HUSBAND & WIFE'S JOINT REVOCABLE TRUSTS

- 3-101 Rev Trust (H&W) - Pourover to Estate of Deceased Settlor
- 3-102 Rev Trust (H&W) - Simple - outright to benefs
- 3-103 Rev Trust (H&W) - Simple - with separate share trusts
- 3-104 Rev Trust (H&W) - Bypass &/or QTIP
- 3-105 Rev Trust (H&W) - Bypass &/or QTIP with separate share trusts
- 3-106 Rev Trust (H&W) - Bypass & QTIP with GST exempt trusts
- 3-107 Rev Trust (H&W) - Bypass & QTIP with GST exempt & nonexempt trusts

HUSBAND'S REVOCABLE TRUSTS

- 3-201 Rev Trust - Simple - outright to benefs
- 3-202 Rev Trust - Simple - with separate share trusts
- 3-203 Rev Trust - Bypass &/or QTIP
- 3-204 Rev Trust - Bypass &/or QTIP with separate share trusts
- 3-205 Rev Trust - Bypass & QTIP with GST exempt trusts
- 3-206 Rev Trust - Bypass & QTIP with GST exempt & nonexempt trusts

WIFE'S REVOCABLE TRUSTS

- 3-301 Rev Trust - Simple - outright to benefs
- 3-302 Rev Trust - Simple - with separate share trusts
- 3-303 Rev Trust - Bypass &/or QTIP
- 3-304 Rev Trust - Bypass &/or QTIP with separate share trusts
- 3-305 Rev Trust - Bypass & QTIP with GST exempt trusts
- 3-306 Rev Trust - Bypass & QTIP with GST exempt & nonexempt trusts

INDIVIDUAL'S REVOCABLE TRUSTS

- 3-401 Rev Trust - Pourover to Estate of Settlor
- 3-402 Rev Trust - Simple - outright to beneficiaries
- 3-403 Rev Trust - Family / Pooled Trust
- 3-404 Rev Trust - Separate Share Trusts

SAME-SEX SPOUSE / DOMESTIC PARTNER #1 REVOCABLE TRUSTS

- 3-501 Rev Trust (Spouse / DP#1) - Simple - outright to beneficiaries
- 3-502 Rev Trust (Spouse / DP#1) - Trust for spouse/partner, then sep share trusts
- 3-503 Rev Trust (Spouse / DP#1) - Separate Share Trusts for one or more benefs

SAME-SEX SPOUSE / DOMESTIC PARTNER #2 REVOCABLE TRUSTS

- 3-601 Rev Trust (Spouse / DP#2) - Simple - outright to beneficiaries
- 3-602 Rev Trust (Spouse / DP#2) - Trust for spouse/partner, then sep share trusts
- 3-603 Rev Trust (Spouse / DP#2) - Separate Share Trusts for one or more benefs

AMENDMENTS TO REVOCABLE TRUSTS

- 4-101 Amendment to Revocable Trust (H&W)
- 4-102 Amendment to Revocable Trust (Husband)
- 4-103 Amendment to Revocable Trust (Wife)
- 4-104 Amendment to Revocable Trust (Indiv)
- 4-105 Amendment to Revocable Trust (Spouse / DP #1)
- 4-106 Amendment to Revocable Trust (Spouse / DP #2)

REVOICATIONS OF REVOCABLE TRUSTS

- 5-101 Revocation of Revocable Trust (H&W)
- 5-102 Revocation of Revocable Trust (Husband)
- 5-103 Revocation of Revocable Trust (Wife)
- 5-104 Revocation of Revocable Trust (Indiv)

- 5-105 Revocation of Revocable Trust (Spouse / DP #1)
- 5-106 Revocation of Revocable Trust (Spouse / DP #2)

MISCELLANEOUS REVOCABLE LIVING TRUST FORMS

HUSBAND & WIFE'S MISCELLANEOUS REV TRUST FORMS

- 6-101 Memorandum Regarding Funding of Rev Trust (H&W)
- 6-102 Letter to Lender Re. Transfer of Account to Rev Trust (H&W)
- 6-103 Certification of Trust (for H&W's Rev Trust)
- 6-104 Letters Regarding Transfer of Accounts (H&W)
- 6-105 Assignment of Property to Revocable Trust (H&W)

HUSBAND'S MISCELLANEOUS REV TRUST FORMS

- 6-201 Memorandum Regarding Funding of Rev Trust
- 6-202 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-203 Certification of Trust (for Husband's Rev Trust)
- 6-204 Letters Regarding Transfer of Accounts
- 6-205 Assignment of Property to Revocable Trust

WIFE'S MISCELLANEOUS REV TRUST FORMS

- 6-301 Memorandum Regarding Funding of Rev Trust
- 6-302 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-303 Certification of Trust (for Wife's Rev Trust)
- 6-304 Letters Regarding Transfer of Accounts
- 6-305 Assignment of Property to Revocable Trust

INDIVIDUAL'S MISCELLANEOUS REV TRUST FORMS

- 6-401 Memorandum Regarding Funding of Rev Trust
- 6-402 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-403 Certification of Trust (for Indiv's Rev Trust)
- 6-404 Letters Regarding Transfer of Accounts
- 6-405 Assignment of Property to Revocable Trust

SAME-SEX SPOUSE #1 / DOMESTIC PARTNER #1 MISC REV TRUST FORMS

- 6-501 Memorandum Regarding Funding of Rev Trust
- 6-502 Letter to Lender Re. Transfer of Account to Rev Trust
- 6-503 Certification of Trust (for Spouse / DP #1's Rev Trust)
- 6-504 Letters Regarding Transfer of Accounts
- 6-505 Assignment of Property to Revocable Trust

LIFE INSURANCE TRUSTS

SECOND TO DIE LIFE INSURANCE TRUST

- 7-101 Second To Die Life Insurance Trust Agreement
- 7-102 Memorandum Regarding Funding of Trust (for Form 7-101)
- 7-103 Withdrawal Letters (for Form 7-101)
- 7-104 Form to Alter Withdrawal Rights (for Form 7-101)
- 7-105 Letter to Insurance Agent (for Form 7-101)
- 7-106 Certification of Trust (for Form 7-101)

WIFE PRIMARY BENEFICIARY LIFE INSURANCE TRUST

- 7-201 Wife Primary Benef Life Ins Trust Agmt - Ins on Husband
- 7-202 Memorandum Regarding Funding of Trust (for Form 7-201)
- 7-203 Withdrawal Letters (for Form 7-201)
- 7-204 Form to Alter Withdrawal Rights (for Form 7-201)
- 7-205 Letter to Insurance Agent (for Form 7-201)
- 7-206 Certification of Trust (for Form 7-201)
- 7-207 Partition Agreement for Insurance Policies (for Form 7-201)
- 7-208 Partition Agreement for Cash (for Form 7-201)
- 7-209 Release of Community Property Interest - Ins Policies (for Form 7-201)
- 7-210 Release of Community Property Interest - Cash (for Form 7-201)

HUSBAND PRIMARY BENEFICIARY LIFE INSURANCE TRUST

- 7-301 Husband Primary Benef Life Ins Trust Agmt - Ins on Wife
- 7-302 Memorandum Regarding Funding of Trust (for Form 7-301)
- 7-303 Withdrawal Letters (for Form 7-301)
- 7-304 Form to Alter Withdrawal Rights (for Form 7-301)
- 7-305 Letter to Insurance Agent (for Form 7-301)
- 7-306 Certification of Trust (for Form 7-301)
- 7-307 Partition Agreement for Insurance Policies (for Form 7-301)
- 7-308 Partition Agreement for Cash (for Form 7-301)

- 7-309 Release of Community Property Interest - Ins Policies (for Form 7-301)
- 7-310 Release of Community Property Interest - Cash (for Form 7-301)

LIFE INSURANCE TRUSTS FOR CHILDREN - INS ON HUSBAND

- 7-401 Life Insurance Trusts For Children - Insurance on Husband
- 7-402 Memorandum Regarding Funding of Trust (for Form 7-401)
- 7-403 Withdrawal Letters (for Form 7-401)
- 7-404 Form to Alter Withdrawal Rights (for Form 7-401)
- 7-405 Letter to Insurance Agent (for Form 7-401)
- 7-406 Certification of Trust (for Form 7-401)

LIFE INSURANCE TRUSTS FOR CHILDREN - INSURANCE ON WIFE

- 7-501 Life Insurance Trusts For Children - Insurance on Wife
- 7-502 Memorandum Regarding Funding of Trust (for Form 7-501)
- 7-503 Withdrawal Letters (for Form 7-501)
- 7-504 Form to Alter Withdrawal Rights (for Form 7-501)
- 7-505 Letter to Insurance Agent (for Form 7-501)
- 7-506 Certification of Trust (for Form 7-501)

LIFE INSURANCE "SPRINKLE" TRUST

- 7-601 Life Ins "Sprinkle" Trust Agreement - Ins on H&W
- 7-602 Memorandum Regarding Funding of Trust (for Form 7-601)
- 7-603 Withdrawal Letters (for Form 7-601)
- 7-604 Form to Alter Withdrawal Rights (for Form 7-601)
- 7-605 Letter to Insurance Agent (for Form 7-601)
- 7-606 Certification of Trust (for Form 7-601)

LIFE INSURANCE TRUSTS FOR CHILDREN - INDIVIDUAL SETTLOR

- 7-701 Life Ins Trusts For Children
- 7-702 Memorandum Regarding Funding of Trust (for Form 7-701)
- 7-703 Withdrawal Letters (for Form 7-701)
- 7-704 Form to Alter Withdrawal Rights (for Form 7-701)
- 7-705 Letter to Insurance Agent (for Form 7-701)
- 7-706 Certification of Trust (for Form 7-701)

LIFE INSURANCE "SPRINKLE" TRUST - INDIVIDUAL SETTLOR

- 7-801 Life Ins "Sprinkle" Trust Agreement - Ins on Indiv
- 7-802 Memorandum Regarding Funding of Trust (for Form 7-801)
- 7-803 Withdrawal Letters (for Form 7-801)
- 7-804 Form to Alter Withdrawal Rights (for Form 7-801)
- 7-805 Letter to Insurance Agent (for Form 7-801)
- 7-806 Certification of Trust (for Form 7-801)

INVESTMENT TRUSTS (IDGT OPTIONAL)

SEPARATE INVESTMENT TRUSTS - NO INSURANCE - H&W SETTLORS

- 8-101 Separate Investment Trusts - no insurance
- 8-102 Memorandum Regarding Funding of Trust (for Form 8-101)
- 8-103 Withdrawal Letters (for Form 8-101)
- 8-104 Form to Alter Withdrawal Rights (for Form 8-101)
- 8-105 Certification of Trust (for Form 8-101)

INVESTMENT "SPRINKLE" TRUST - NO INSURANCE - H&W SETTLORS

- 8-201 Investment "Sprinkle" Trust Agreement - no insurance
- 8-202 Memorandum Regarding Funding of Trust (for Form 8-201)
- 8-203 Withdrawal Letters (for Form 8-201)
- 8-204 Form to Alter Withdrawal Rights (for Form 8-201)
- 8-205 Certification of Trust (for Form 8-201)

SEPARATE INVESTMENT TRUSTS - NO INS - INDIV SETTLOR

- 8-301 Separate Investment Trusts - no insurance
- 8-302 Memorandum Regarding Funding of Trust (for Form 8-301)
- 8-303 Withdrawal Letters (for Form 8-301)
- 8-304 Form to Alter Withdrawal Rights (for Form 8-301)
- 8-305 Certification of Trust (for Form 8-301)

INVESTMENT "SPRINKLE" TRUST - NO INS - INDIV SETTLOR

- 8-401 Investment "Sprinkle" Trust Agreement - no insurance
- 8-402 Memorandum Regarding Funding of Trust (for Form 8-401)
- 8-403 Withdrawal Letters (for Form 8-401)
- 8-404 Form to Alter Withdrawal Rights (for Form 8-401)

8-405 Certification of Trust (for Form 8-401)

S CORPORATION TRUSTS

QUALIFIED S CORPORATION TRUSTS - H&W SETTLORS

- 9-101 Qualified S Corporation Trust Agreement
- 9-102 Memorandum Regarding Funding of Trust (for Form 9-101)
- 9-103 Withdrawal Letters (for Form 9-101)
- 9-104 Form to Alter Withdrawal Rights (for Form 9-101)
- 9-105 Certification of Trust (for Form 9-101)

QUALIFIED S CORPORATION TRUSTS - INDIV SETTLOR

- 9-201 Qualified S Corporation Trust Agreement
- 9-202 Memorandum Regarding Funding of Trust (for Form 9-201)
- 9-203 Withdrawal Letters (for Form 9-201)
- 9-204 Form to Alter Withdrawal Rights (for Form 9-201)
- 9-205 Certification of Trust (for Form 9-201)

GRANDCHILDREN'S TRUSTS

GRANDCHILDREN'S TRUSTS - H&W SETTLORS

- 10-101 Grandchildren's Trust Agreement - GST qualifying
- 10-102 Memorandum Regarding Funding of Trust (for Form 10-101)
- 10-103 Withdrawal Letters (for Form 10-101)
- 10-104 Form to Alter Withdrawal Rights (for Form 10-101)
- 10-105 Certification of Trust (for Form 10-101)

GRANDCHILDREN'S TRUSTS - INDIV SETTLOR

- 10-201 Grandchildren's Trust Agreement - GST qualifying
- 10-202 Memorandum Regarding Funding of Trust (for Form 10-201)
- 10-203 Withdrawal Letters (for Form 10-201)
- 10-204 Form to Alter Withdrawal Rights (for Form 10-201)
- 10-205 Certification of Trust (for Form 10-201)

2503(C) TRUSTS

2503(C) TRUST - H&W SETTLORS

- 11-101 2503(c) Trust Agreement
- 11-102 Memorandum Regarding Funding of Trust (for Form 11-101)
- 11-103 Certification of Trust (for Form 11-101)

2503(C) TRUST - INDIVIDUAL SETTLOR

- 11-201 2503(c) Trust Agreement
- 11-202 Memorandum Regarding Funding of Trust (for Form 11-201)
- 11-203 Certification of Trust (for Form 11-201)

QUALIFIED PERSONAL RESIDENCE TRUSTS

QUALIFIED PERSONAL RESIDENCE TRUST - H&W SETTLORS

- 12-101 Qualified Personal Residence Trust Agreement
- 12-102 Memorandum Regarding Funding of Trust (for Form 12-101)
- 12-103 Certification of Trust (for Form 12-101)

QUALIFIED PERSONAL RESIDENCE TRUST - HUSBAND SETTLOR

- 12-201 Qualified Personal Residence Trust Agreement
- 12-202 Memorandum Regarding Funding of Trust (for Form 12-201)
- 12-203 Certification of Trust (for Form 12-201)

QUALIFIED PERSONAL RESIDENCE TRUST - WIFE SETTLOR

- 12-301 Qualified Personal Residence Trust Agreement
- 12-302 Memorandum Regarding Funding of Trust (for Form 12-301)
- 12-303 Certification of Trust (for Form 12-301)

QUALIFIED PERSONAL RESIDENCE TRUST - INDIV SETTLOR

- 12-401 Qualified Personal Residence Trust Agreement
- 12-402 Memorandum Regarding Funding of Trust (for Form 12-401)
- 12-403 Certification of Trust (for Form 12-401)

CHARITABLE REMAINDER ANNUITY TRUSTS

CHARITABLE REMAINDER ANNUITY TRUST - H&W SETTLORS

- 13-101 Charitable Remainder Annuity Trust Agreement
- 13-102 Memorandum Regarding Funding of Trust (for Form 13-101)
- 13-103 Certification of Trust (for Form 13-101)

CHARITABLE REMAINDER ANNUITY TRUSTS - HUSBAND SETTLOR

- 13-201 Charitable Remainder Annuity Trust Agreement
- 13-202 Memorandum Regarding Funding of Trust (for Form 13-201)
- 13-203 Certification of Trust (for Form 13-201)

CHARITABLE REMAINDER ANNUITY TRUST - WIFE SETTLOR

- 13-301 Charitable Remainder Annuity Trust Agreement
- 13-302 Memorandum Regarding Funding of Trust (for Form 13-301)
- 13-303 Certification of Trust (for Form 13-301)

CHARITABLE REMAINDER ANNUITY TRUST - INDIV SETTLOR

- 13-401 Charitable Remainder Annuity Trust Agreement
- 13-402 Memorandum Regarding Funding of Trust (for Form 13-401)
- 13-403 Certification of Trust (for Form 13-401)

CHARITABLE REMAINDER UNITRUSTS

CHARITABLE REMAINDER UNITRUST - H&W SETTLORS

- 14-101 Charitable Remainder Unitrust Agreement
- 14-102 Memorandum Regarding Funding of Trust (for Form 14-101)
- 14-103 Certification of Trust (for Form 14-101)

CHARITABLE REMAINDER UNITRUST - HUSBAND SETTLOR

- 14-201 Charitable Remainder Unitrust Agreement
- 14-202 Memorandum Regarding Funding of Trust (for Form 14-201)
- 14-203 Certification of Trust (for Form 14-201)

CHARITABLE REMAINDER UNITRUST - WIFE SETTLOR

- 14-301 Charitable Remainder Unitrust Agreement
- 14-302 Memorandum Regarding Funding of Trust (for Form 14-301)
- 14-303 Certification of Trust (for Form 14-301)

CHARITABLE REMAINDER UNITRUST - INDIV SETTLOR

- 14-401 Charitable Remainder Unitrust Agreement
- 14-402 Memorandum Regarding Funding of Trust (for Form 14-401)
- 14-403 Certification of Trust (for Form 14-401)

CHARITABLE LEAD TRUSTS

CHARITABLE LEAD TRUST - H&W SETTLORS

- 15-101 Charitable Lead Trust Agreement
- 15-102 Memorandum Regarding Funding of Trust (for Form 15-101)
- 15-103 Certification of Trust (for Form 15-101)

CHARITABLE LEAD TRUST - HUSBAND SETTLOR

- 15-201 Charitable Lead Trust Agreement
- 15-202 Memorandum Regarding Funding of Trust (for Form 15-201)
- 15-203 Certification of Trust (for Form 15-201)

CHARITABLE LEAD TRUST - WIFE SETTLOR

- 15-301 Charitable Lead Trust Agreement
- 15-302 Memorandum Regarding Funding of Trust (for Form 15-301)
- 15-303 Certification of Trust (for Form 15-301)

CHARITABLE LEAD TRUST - INDIV SETTLOR

- 15-401 Charitable Lead Trust Agreement
- 15-402 Memorandum Regarding Funding of Trust (for Form 15-401)
- 15-403 Certification of Trust (for Form 15-401)

GRANTOR RETAINED ANNUITY TRUSTS

GRANTOR RETAINED ANNUITY TRUST - HUSBAND SETTLOR

- 16-101 Grantor Retained Annuity Trust Agreement
- 16-102 Memorandum Regarding Funding of Trust (for Form 16-101)
- 16-103 Certification of Trust (for Form 16-101)

GRANTOR RETAINED ANNUITY TRUST - WIFE SETTLOR

- 16-201 Grantor Retained Annuity Trust Agreement
- 16-202 Memorandum Regarding Funding of Trust (for Form 16-201)
- 16-203 Certification of Trust (for Form 16-201)

GRANTOR RETAINED ANNUITY TRUST - INDIV SETTLOR

- 16-301 Grantor Retained Annuity Trust Agreement
- 16-302 Memorandum Regarding Funding of Trust (for Form 16-301)

16-303 Certification of Trust (for Form 16-301)

GRANTOR RETAINED UNITRUSTS

GRANTOR RETAINED UNITRUST - HUSBAND SETTLOR

- 17-101 Grantor Retained Unitrust Agreement
- 17-102 Memorandum Regarding Funding of Trust (for Form 17-101)
- 17-103 Certification of Trust (for Form 17-101)

GRANTOR RETAINED UNITRUST - WIFE SETTLOR

- 17-201 Grantor Retained Unitrust Agreement
- 17-202 Memorandum Regarding Funding of Trust (for Form 17-201)
- 17-203 Certification of Trust (for Form 17-201)

GRANTOR RETAINED UNITRUST - INDIV SETTLOR

- 17-301 Grantor Retained Unitrust Agreement
- 17-302 Memorandum Regarding Funding of Trust (for Form 17-301)
- 17-303 Certification of Trust (for Form 17-301)

SUPPLEMENTAL NEEDS TRUSTS

SUPPLEMENTAL NEEDS TRUST - H&W SETTLORS

- 18-101 Supplemental Needs Trust Agreement
- 18-102 Memorandum Regarding Funding of Trust (for Form 18-101)
- 18-103 Certification of Trust (for Form 18-101)

SUPPLEMENTAL NEEDS TRUST - HUSBAND SETTLOR

- 18-201 Supplemental Needs Trust Agreement
- 18-202 Memorandum Regarding Funding of Trust (for Form 18-201)
- 18-203 Certification of Trust (for Form 18-201)

SUPPLEMENTAL NEEDS TRUST - WIFE SETTLOR

- 18-301 Supplemental Needs Trust Agreement
- 18-302 Memorandum Regarding Funding of Trust (for Form 18-301)
- 18-303 Certification of Trust (for Form 18-301)

SUPPLEMENTAL NEEDS TRUST - INDIV SETTLOR

- 18-401 Supplemental Needs Trust Agreement
- 18-402 Memorandum Regarding Funding of Trust (for Form 18-401)
- 18-403 Certification of Trust (for Form 18-401)

QUALIFIED INCOME ("MILLER" OR "(D)(4)(B)") TRUST

- 19-101 Qualified Income ("Miller") Trust Agreement
- 19-102 Memorandum Regarding Funding of Trust (for Form 19-101)
- 19-103 Letter from Attorney to Bank (for Form 19-101)

MISCELLANEOUS FORMS

PRELIMINARY INFORMATION FORMS

- 50-101 Preliminary Information (Married clients)
- 50-102 Preliminary Information (Indiv client)
- 50-103 Preliminary Information (Same-sex Spouses / Domestic Partners)

FACT FINDERS

- 51-101 Attorney Fact Finder (Married clients)
- 51-102 Attorney Fact Finder (Indiv client)
- 51-103 Attorney Fact Finder (Same-sex Spouses / Domestic Partners)

FEE AGREEMENTS

- 52-101 Fee Agreement (Married clients)
- 52-102 Fee Agreement (Indiv client)
- 52-103 Fee Agreement (for one Same-sex Spouse / Domestic Partner)
- 52-104 Fee Agreement (for two Same-sex Spouses / Domestic Partners)

NOTICE REGARDING DOCUMENTS DEPOSITED WITH ATTORNEY

- 53-101 Notice Regarding Documents Deposited With Attorney
- 53-102 Notice Regarding Documents Deposited With Attorney
- 53-103 Notice Regarding Documents Deposited With Attorney
- 53-104 Notice Regarding Documents Deposited With Attorney
- 53-105 Notice Regarding Documents Deposited With Attorney

WILL & CODICIL SIGNING CEREMONY

- 54-101 Will & Codicil Signing Ceremony (for Husband & Wife)

- 54-102 Will & Codicil Signing Ceremony (for Indiv)
- 54-103 Will & Codicil Signing Ceremony (for Same-sex Spouse #1 / DP #1)
- 54-104 Will & Codicil Signing Ceremony (for Same-sex Spouse #2 / DP #2)

MISCELLANEOUS DOCUMENTS

HUSBAND'S MISCELLANEOUS DOCUMENTS

- 144-101 Medical Power of Attorney
- 144-102 HIPAA Release
- 144-103 Directive to Physicians
- 144-104 Combo Directive to Physicians & Medical POA
- 144-105 Durable Power of Attorney
- 144-106 Notice to Person Executing Power of Attorney
- 144-107 Notice to Person Accepting Appointment as Agent
- 144-108 Certification of Agent
- 144-109 Affidavit of Physician (that Husband lacks capacity)
- 144-110 Texas Probate Code Provisions
- 144-111 Revocation of Power of Attorney
- 144-112 Revocation of Medical Power of Attorney
- 144-113 Declaration of Guardian
- 144-114 Appointment of Guardian For Children
- 144-115 Designation of Health Care Agent for Children
- 144-116 Memorandum Regarding Personal Belongings
- 144-117 Declaration for Mental Health Treatment
- 144-118 Appointment of Agent to Dispose of Remains
- 144-119 Form to Donate Body for Medical Study
- 144-120 Gift by a Living Donor Exhibit
- 144-121 Video Will Checklist

WIFE'S MISCELLANEOUS DOCUMENTS

- 144-201 Medical Power of Attorney
- 144-202 HIPAA Release
- 144-203 Directive to Physicians
- 144-204 Combo Directive to Physicians & Medical POA
- 144-205 Durable Power of Attorney
- 144-206 Notice to Person Executing Power of Attorney
- 144-207 Notice to Person Accepting Appointment as Agent
- 144-208 Certification of Agent
- 144-209 Affidavit of Physician (that Wife lacks capacity)
- 144-210 Texas Probate Code Provisions
- 144-211 Revocation of Power of Attorney
- 144-212 Revocation of Medical Power of Attorney
- 144-213 Declaration of Guardian
- 144-214 Appointment of Guardian For Children
- 144-215 Designation of Health Care Agent for Children
- 144-216 Memorandum Regarding Personal Belongings
- 144-217 Declaration for Mental Health Treatment
- 144-218 Appointment of Agent to Dispose of Remains
- 144-219 Form to Donate Body for Medical Study
- 144-220 Gift by a Living Donor Exhibit
- 144-221 Video Will Checklist

INDIVIDUAL'S MISCELLANEOUS DOCUMENTS

- 144-301 Medical Power of Attorney
- 144-302 HIPAA Release
- 144-303 Directive to Physicians
- 144-304 Combo Directive to Physicians & Medical POA
- 144-305 Durable Power of Attorney
- 144-306 Notice to Person Executing Power of Attorney
- 144-307 Notice to Person Accepting Appointment as Agent
- 144-308 Certification of Agent
- 144-309 Affidavit of Physician (that Indiv lacks capacity)
- 144-310 Texas Probate Code Provisions
- 144-311 Revocation of Power of Attorney
- 144-312 Revocation of Medical Power of Attorney
- 144-313 Declaration of Guardian
- 144-314 Appointment of Guardian For Children

144-315 Designation of Health Care Agent for Children
 144-316 Memorandum Regarding Personal Belongings
 144-317 Declaration for Mental Health Treatment
 144-318 Appointment of Agent to Dispose of Remains
 144-319 Form to Donate Body for Medical Study
 144-320 Gift by a Living Donor Exhibit
 144-321 Video Will Checklist

SAME-SEX SPOUSE / DOMESTIC PARTNER #1 MISC DOCS

144-401 Medical Power of Attorney
 144-402 HIPAA Release
 144-403 Directive to Physicians
 144-404 Combo Directive to Physicians & Medical POA
 144-405 Durable Power of Attorney
 144-406 Notice to Person Executing Power of Attorney
 144-407 Notice to Person Accepting Appointment as Agent
 144-408 Certification of Agent
 144-409 Affidavit of Physician (that Spouse / DP #1 lacks capacity)
 144-410 Texas Probate Code Provisions
 144-411 Revocation of Power of Attorney
 144-412 Revocation of Medical Power of Attorney
 144-413 Declaration of Guardian
 144-414 Appointment of Guardian For Children
 144-415 Designation of Health Care Agent for Children
 144-416 Memorandum Regarding Personal Belongings
 144-417 Declaration for Mental Health Treatment
 144-418 Appointment of Agent to Dispose of Remains
 144-419 Form to Donate Body for Medical Study
 144-420 Gift by a Living Donor Exhibit
 144-421 Video Will Checklist

SAME-SEX SPOUSE / DOMESTIC PARTNER #2 MISC DOCS

144-501 Medical Power of Attorney
 144-502 HIPAA Release
 144-503 Directive to Physicians
 144-504 Combo Directive to Physicians & Medical POA
 144-505 Durable Power of Attorney
 144-506 Notice to Person Executing Power of Attorney
 144-507 Notice to Person Accepting Appointment as Agent
 144-508 Certification of Agent
 144-509 Affidavit of Physician (that Spouse / DP #2 lacks capacity)
 144-510 Texas Probate Code Provisions
 144-511 Revocation of Power of Attorney
 144-512 Revocation of Medical Power of Attorney
 144-513 Declaration of Guardian
 144-514 Appointment of Guardian For Children
 144-515 Designation of Health Care Agent for Children
 144-516 Memorandum Regarding Personal Belongings
 144-517 Declaration for Mental Health Treatment
 144-518 Appointment of Agent to Dispose of Remains
 144-519 Form to Donate Body for Medical Study
 144-520 Gift by a Living Donor Exhibit
 144-521 Video Will Checklist

DEEDS

144-601 Deed (H&W) - Transfer to Husband and Wife's Joint Revocable Trust
 144-602 Deed (H&W) - Transfer half to H's Rev Trust & half to W's Rev Trust
 144-603 Deed - Transfer to Husband's Revocable Trust
 144-604 Deed - Transfer to Wife's Revocable Trust
 144-605 Deed - Transfer to Individual's Revocable Trust
 144-606 Deed - Transfer to Spouse / DP #1's Rev Trust
 144-607 Deed - Transfer to Spouse / DP #2's Rev Trust
 144-608 Deed (H&W) - Transfer to Husband and Wife's QPRT
 144-609 Deed (H&W) - Transfer half to H's QPRT & half to W's QPRT
 144-610 Deed - Transfer to Husband's QPRT
 144-611 Deed - Transfer to Wife's QPRT
 144-612 Deed - Transfer to Individual's QPRT

SECTION 142 TRUST

144-701 Section 142 Trust Agreement
 144-702 Application to Establish Section 142 Trust
 144-703 Order Establishing Section 142 Trust
 144-704 Trustee's Application To Approve Sect. 142 Trustee Fees
 144-705 Order Approving Section 142 Trustee's Fees

SECTION 867 MANAGEMENT TRUST

144-801 Section 867 Management Trust Agreement
 144-802 Application to Establish Section 867 Trust
 144-803 Order Establishing Section 867 Trust
 144-804 Trustee's Application To Approve Sect. 867 Trustee Fees
 144-805 Order Approving Section 867 Trustee Fees

FAMILY LIMITED PARTNERSHIP

144-901 Agreement of Limited Partnership
 144-902 Certificate of Formation
 144-903 Assignment of Limited Partner Interest
 144-904 Subscription Agreement
 144-905 Memorandum Regarding Administration of FLP
 144-906 Assumed Name Certificate

MARITAL PROPERTY AGREEMENTS

PRE-MARITAL PROPERTY AGREEMENT

144-1001 Pre-marital Agreement
 144-1002 Pre-marital Agreement Attorney Checklist (for use with Form 144-901)
 144-1003 Voluntary Waiver of Further Disclosure (for use with Form 144-901)
 144-1004 Reaffirmation of Premarital Agreement (for use with Form 144-901)

POST-MARITAL PROPERTY AGREEMENT - COMPREHENSIVE

144-1101 Post-marital Agreement - Comprehensive
 144-1102 Post-marital Agreement Attorney Checklist (for use with Form 144-1001)
 144-1103 Voluntary Waiver of Further Disclosure (for use with Form 144-1001)

POST-MARITAL PROPERTY AGREEMENT - CASH AND SPECIFIED ASSETS

144-1201 Post-marital Agreement - Cash and Specified Assets
 144-1202 Voluntary Waiver of Further Disclosure (for use with Form 144-1101)

AGREEMENT TO CONVERT SEPARATE PROPERTY TO COMMUNITY PROPERTY

144-1301 Agreement to Convert Separate Property to Community Property

AUTHORIZATION AGREEMENTS

144-1401 Authorization Agreement (for Husband and Wife)
 144-1402 Authorization Agreement
 144-1403 Authorization Agreement (Same-sex Spouse #1 / DP #1)
 144-1404 Authorization Agreement (Same-sex Spouse #2 / DP #2)
 144-1405 Authorization Agreement For Nonparent Relative - DFPS Form 2638

BUY SELL AGREEMENTS

144-1501 Wait and See Buy Sell Agreement
 144-1502 Cross Purchase Buy Sell Agreement
 144-1503 Stock Redemption Buy Sell Agreement

MISCELLANEOUS LETTERS & FORMS

ANSWERS TO FREQUENTLY ASKED QUESTIONS

144-1601 Answers to Frequently Asked Questions

TRUST ADMINISTRATION DOCUMENTS

144-1701 Affidavit of Successor Trustee

TRANSMITTAL LETTERS

200-101 Letter Sent with Drafts
 200-102 Letter Sent with Signed Originals

LETTERS REGARDING NEW TAX LAWS

200-201 Letter to client regarding 2010 Tax Act - Long Version
 200-202 Letter to client regarding 2010 Tax Act - Short Version