Essential Estate Planning™
Forms List & Options Summary

interactive legal suite

Wills

Separate & Community Property. State specific options and language. Fiduciary powers options. Executive Summary. Support for single and married persons. Support for unmarried couples, including those of same sex.

- ✓ **Pourover Will** Pre-residuary gift and tax apportionment options.
- ✓ **Simple Will** For clients of very modest wealth. No tax planning. Limited options.
- ✓ **Essentials Will** For clients of moderate wealth requiring little/no tax planning. Outright or QTIP for spouse. Descendants' distributions outright or in separate or single trusts. Options for bypass trust and testamentary SNTs. Disclaimer planning, including provisions relevant for planning in 2010. Planning in decoupled states.

Revocable Trusts

Separate & Community Property. State specific options and language. Fiduciary powers options. Executive Summary. Funding Instructions. Certificate of Trust. Support for single and married persons. Support for unmarried couples including those of same sex. Practitioner Action Steps Checklist.

- ✓ **Essentials Revocable Trust** For clients of moderate wealth requiring little/no no tax planning. Outright or QTIP for spouse. Descendants' distributions outright or in separate or single trusts. Bypass trust. Testamentary SNTs. Disclaimer planning, including provisions relevant for planning in 2010. Planning in decoupled states.
- ✓ **Essentials Joint (Dual Grantor) Revocable Trust** For clients of moderate wealth requiring little/no tax planning. Outright or QTIP for spouse. Descendants' distributions outright or in separate or single trusts. Options for bypass trust and disclaimer planning, including provisions relevant for planning in 2010. Planning in decoupled states. Option for Domestic Partner Trust.

Irrevocable Trusts

State specific options and language. Practitioner Action Steps Checklist. Fiduciary powers options. Certificate of Trust. Executive Summary. Crummey Notices.

- ✓ **Essentials Irrevocable Trust – Single and Dual Grantors** For grantors with estates requiring basic drafting options. Option for Life Insurance. Lifetime Trust for spouse and/or descendants. Contingent Marital Trust. Family Trust for spouse. Separate or single trusts for descendants.

Agreements

- ✓ **Private Annuity Agreement**
- ✓ **Separate Property Agreement** (Agreement between spouses as to separate property rights.)
- ✓ **Partition Agreement** (Agreement between spouses to partition community property.)
- ✓ **Spousal Agreement** (Agreement between spouses regarding property rights.)

Strategic Planning Analyses and Memoranda

Produce memorandum of recommendations to client or practitioner on specific planning strategies.

- ✓ **Transfers to Minors** (Analysis/Advice on how to effectuate a property transfer to a minor.)
- ✓ **Transfers in Trust vs. Outright** (Analysis/Advice determines whether property should be transferred outright or in trust.)
- ✓ **Using Wills vs. Revocable Trusts** (Analysis/Advice on choosing the correct instrument.)
- ✓ **Ownership of Life Insurance** (Analysis/Advice in determining who should own insurance on client's life.)

Powers of Attorney

State specific forms.

- ✓ **Durable Power of Attorney**
- ✓ **Health Care Directive (Power of Attorney)**
- ✓ **Living Will** (For states where separate living wills are used.)
- ✓ **HIPAA Release**

Practitioner Planning Aids

- ✓ **Engagement Letter and Fee Agreement**
- ✓ **DocuBank™ Transmittal Letter & Enrollment Form**