

We're More Than Just Documents.
We're a Complete System.



Estate Planning System Advanced Package

Initial Contact

Checklist for Scheduling New Appointment
Initial Letter
Questionnaires for Married and Single Clients
Check Plan
Dangers Letter for Slow Moving Contacts
Engagement Letter

Estate Planning Documents

Will
Individual Revocable Living Trust
Joint Revocable Living Trust
Contract to Make a Will
Resignation of Trustee
Amendment to Trust
Trust Revocation Agreement
Certificate of Revocable Trust

Powers of Attorney

General Durable POA
Real Estate POA
Banking POA
Securities POA
Limited POA to Make Gifts
POA for Minor or Disabled Child

POA Appointing Educational Representative
Health Care POA and Living Will
HIPAA Authorization Form
Revocation of POA
Affidavit of Alternate Agent

Advanced Trusts

2503© Trust
Conduit Trust
GRAT
QPRT
CRAT
CRUT
Life Insurance Trust
Pet Trust
SNT

Other Planning Documents

Family Limited Partnership
LLC Vacation Home
Prenuptial Agreement
Domestic Partnership Agreement
Statement of Priority of Visitation Rights
Letter to Physician re: Capacity
Gift tax Letter
Gift Tax Form

Designation of Beneficiary for IRA Account
Escrow Agreement
2848
W-9
SS4

Additional Documents

Cover Letter
Questions and Answers
Directions with Respect to Remains
Letter of Last Instructions
Docubank Letter
Letter Regarding Update Appointment
Tax Seminar Follow-up
Disengagement Letter
Survey
SNT Protection Letter
Funding Letters

Questionnaires

Special Circumstances Estate Planning
Questionnaire - Married Estate Planning
Questionnaire - Single
Update Questionnaires