

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



Estate Planning Basic Package Document List

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

Basic Estate Planning Documents

Will*

Powers of Attorney

General Durable POA
Health Care POA and Living Will
HIPAA Authorization Form
Revocation of POA
Affidavit of Alternate Agent

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

Questionnaires

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

***Note: Does not include tax planning provisions**