

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



Estate Planning Standard 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

Standard 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

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
Funding Letters

Questionnaires

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