

Master Document List

Descriptions Included

Sections

- **Initial Contact Documents**
- **Basic Documents**
- **Will, Living Trust, and Related Documents**
- **Powers of Attorney and Related Documents**
- **Advanced Trusts**
- **Other Planning Documents**
- **Cover Letter**
- **Closing and Update Appointments**
- **Marketing**
- **Docs My Way ©**
- **Custom Templates**
- **Acknowledgments, Notary Blocks and Other Inserts**
- **Decision Trees**
- **State Specific Documents**

Initial Contact Documents

1. Checklist for scheduling new appointments
2. Initial letter - first appointment
3. Initial letter - update appointment
4. Client estate planning questionnaire

- i. **Option to include Questionnaire for Married or Single Client, Special Circumstances, and Pet Supplemental Information**

This is sent to the Client with the Initial Letter.

5. Check plan

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6. Special circumstances

- i. **Clients often schedule appointments for Estate Planning without being fully aware of what they need. In addition to tax planning, several family circumstances need to be addressed. This form is designed for the attorney to complete at the beginning of the initial client interview. It focuses the client on issues that need to be addressed and the value in handling them properly.**

7. Pet supplemental information

- i. **This form has been designed for pet owners. Many states now have statutes authorizing pet trusts. Some have limits as to the amount that can be used to fund a pet trust. It is useful to attempt to estimate the annual care costs and multiply by the life expectancy of the pet to arrive at an adequate amount to fund the trust.**

In many instances, the Pet Trustee will be different from the Pet Caretaker. The Pet Trustee will manage the money. The Pet Caretaker will care for the pet.

8. Items to bring to the first appointment

- i. **NOTE: A list is already provided in the initial letter.**

9. Basic documents decision tree

- i. **Each document has a corresponding Decision Tree. The Decision Tree provides the series of questions that appear in the dialog boxes. They are a concise "roadmap" of the document's logic, style and contents. Decision Trees are selected, printed, and taken to client meetings. The Decision Trees prompt you to ask the appropriate questions, so the discovery**



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process works efficiently. They ensure accuracy and reduce the number of return conversations with the client for more information.

Decision Trees have all the questions necessary to create a document.

10. Additional documents decision tree
11. Database form
12. Engagement letter
13. Dangers letter for slow-moving contacts

- i. Letter warning clients who are shopping around for attorneys, cancel appointments, or only call for information on the dangers in waiting to complete their estate planning.**

Basic Documents

14. Will
15. Individual Revocable Living Trust
16. Joint Revocable Living Trust
17. Joint Revocable Living Trust - Beta (Do NOT use in Community Property States)
18. Health Care Power of Attorney and Living Will

- i. Clients are anxious to sign a Living Will/Health Care Power of Attorney giving direction not to be kept alive if there is no reasonable hope of recovery or regaining a meaningful quality of life. Other clients are reluctant to discuss the issue. Clients need to understand that there are four choices: (1) a Living Will indicating an intention not to be kept alive, (2) a Living Will directing aggressive treatment no matter how hopeless the**

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situation, (3) a Medical Power of Attorney authorizing a loved one to make medical decisions in the future, and (4) Do nothing, in which event a judge may well make the final medical decisions. Once clients understand option 4, they are much more apt to exercise their rights under options 1, 2 or 3.

This document is designed in two phases. One is for use as a Medical Power of Attorney to make medical decisions not relating to end-of-life, and the other is to make medical decisions relating to the end-of-life. Some practitioners include the medical decision-making provisions in the Financial Power of Attorney, but the agent under the Financial Power of Attorney is often different from the health care representative under the Living Will/Health Care Power of Attorney. A better practice is to combine all medical decision-making powers into one document.

Some clients do not want to face end-of-life decision-making and simply want to pass the responsibility to a loved one. Other clients may be in the early stages of dementia and have difficulty processing all of the information to make all of the decisions necessary for the Living Will, but do have sufficient capacity to appoint someone to act as a Medical Power of Attorney. This document can combine the Living Will and Health Care Power of Attorney or can act solely as a Medical Power of Attorney.

19. General Durable Power of Attorney

- i. Financial Powers of Attorney are very powerful documents. Third parties refuse to accept a Power of Attorney on the grounds that the action they are being asked to perform is not specifically authorized. Therefore, it is good practice to make the document comprehensive. Whether the document should become effective immediately or only upon certification of incapacity by a physician is an individual client preference and depends on the level of confidence the principal has in the proposed Agent.**

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As appropriate, automatically includes a letter to the agent and PA Notice.

Includes a springing option.

20. Banking Power of Attorney

- i. Third parties do not like to read lengthy documents. By carving the Banking Power of Attorney out of the main document, the bank is much more likely to accept it easily.**

21. Securities Power of Attorney

- i. Third parties do not like to read lengthy documents. By carving the Securities and Brokerage Accounts Power of Attorney out of the main document, the brokerage firm is much more likely to accept it easily.**

22. Real Estate Power of Attorney

- i. Third parties do not like to read lengthy documents. By carving the Real Estate Power of Attorney out of the main document, the buyer's attorney or title company is much more likely to accept it easily.**

23. Engagement Letter

24. Cover Letter

25. Funding Letters/Letters Retitling Assets or Changing Beneficiary Designations

26. Trusts - Funding Tracking Form

Will, Living Trust, and Related Documents

27. Will

28. Individual Revocable Living Trust

29. Joint Revocable Living Trust

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30. Agreement to Divide Trust

31. Agreement to Merge Trust

32. Certificate of Joint Revocable Trust

i. Inserted automatically into the Joint Revocable Living Trust.

33. Certificate of Revocable Trust

i. Inserted automatically into the Joint Revocable Living Trust.

34. Codicil to Last Will and Testament

35. Contract to Make a Will

- i. A Contract to Make a Will is often useful in a second marriage situation. Where there is a blended family, the first spouse to die often leaves his or her estate to the surviving spouse with the understanding that the surviving spouse will include a child by both marriages in the survivor's Will. Frequently, the surviving spouse changes the Will and disinherits the children of the first spouse to die. A Contract to Make a Will overrides this.**

36. Resignation of Trustee

- i. For various reasons an original trustee will occasionally resign and a successor trustee will be appointed by the original trustee or may simply be named in the original document and succeed to the rights and responsibilities of the original trustee. This form is designed to memorialize the resignation, appointment and acceptance by the successor trustee.**

37. Trust Revocation Agreement

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- i. **For various reasons, Grantors elect to revoke trusts after they have been established. In such instances, a Trust Revocation Agreement should be used. The document memorializes the revocation, and in cases where there is a third party trustee, provides for a Waiver of Court Accounting and Release and Indemnification.**

38. (BETA) Will, Individual RLT, Healthcare POA, and General POA Master Interview

39. Additional Will Clauses

- i. Bloodline Trust (Will Version)
- ii. Incentive Trust (Will Version)
- iii. Life Estate Clause

1. **Often a client will want to give a spouse (often the spouse of a second marriage) or a child a right to live in the home for that beneficiary's lifetime. A life estate is appropriate, but it is important to spell out the terms of the life estate.**

iv. Environmental Review Clause

1. **In order to avoid liability for environmental clean-up, it is useful to give Executors and Trustees the right to refuse, to monitor real estate and to disclaim or refuse to take title to the property where there may be environmental contamination.**

v. Drugs, Alcohol or Criminal Acts Clause

1. **Clients occasionally have children who abuse drugs and/or alcohol or who engage in criminal behavior. This clause is designed to defer distribution to such beneficiaries.**

vi. Payment to Legal or Defacto Guardian Clause

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- 1. This paragraph is designed to encourage a guardian to provide a level of care to the client's minor or incapacitated child or children that is a higher standard of living than may be enjoyed by the guardian.**

vii. Closely Held Stock/Membership Interest Clause

- 1. This is a paragraph that is appropriate when the client owns stock in a closely held company and wants the estate to retain that stock even though it may violate what would normally be the fiduciary duty of the Executor.**

viii. Advancements Prior to Death Clause

- 1. Occasionally clients will advance monies to one or more of their children. The question is whether these funds should later be deducted from the share of that child or children. The first option is used when it is the client's intention that the advancement is in addition to any legacy or benefit under the Will. The second option is used when it is the intention of the client that the advancement should be deducted from the child's share of the estate.**

ix. Treatment of Specific Gift as an Advancement Clause

x. Special Needs Guardian Clause

xi. Pet Clauses

xii. Execution and Attestation Clauses

xiii. Merger of Trusts Clause

- 1. This clause belongs under the Powers of Trustee section**

xiv. Division of Trust Clause

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1. This clause belongs under the Powers of Trustee section

40. Additional Trust Clauses

i. Amendment to Trust

1. **An Amendment to Trust is appropriate where there are only minor changes. If more significant changes are to be made, a Restatement of Trust is the more appropriate document.**

- ii. Bloodline Trust (Trust Version)
- iii. Incentive Trust (Trust Version)
- iv. Qualified Domestic Trust Clause
- v. Closely Held Stock Clause
- vi. 5&5 Power Clause

1. Put this paragraph between the income and principal paragraphs.

vii. Merger of Trusts Clause

1. This clause belongs under the Powers of Trustee section

viii. Division of Trust Clause

1. This clause belongs under the Powers of Trustee section

Powers of Attorney and Related Documents

41. Health Care Power of Attorney and Living Will

- i. **Clients are anxious to sign a Living Will/Health Care Power of Attorney giving direction not to be kept alive if there is no reasonable hope of recovery or regaining a meaningful quality of life. Other clients are**

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reluctant to discuss the issue. Clients need to understand there are four choices: (1) a Living Will indicating an intention not to be kept alive, (2) a Living Will directing aggressive treatment no matter how hopeless the situation, (3) a Medical Power of Attorney authorizing a loved one to make medical decisions in the future, and (4) Do nothing, in which event a judge may well make the final medical decisions. Once clients understand option 4, they are much more apt to exercise their rights under options 1, 2 or 3.

This document is designed in two phases. One is for use as a Medical Power of Attorney to make medical decisions not relating to end-of-life, and the other is to make medical decisions relating to the end-of-life. Some practitioners include the medical decision-making provisions in the Financial Power of Attorney, but the agent under the Financial Power of Attorney is often different from the health care representative under the Living Will/Health Care Power of Attorney. A better practice is to combine all medical decision-making powers into one document.

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of incapacity by a physician is an individual client preference and depends on the level of confidence the principal has in the proposed Agent.

As appropriate, automatically includes a letter to the agent and PA Notice.

Includes a springing option.

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- i. Third parties do not like to read lengthy documents. By carving the Banking Power of Attorney out of the main document, the bank is much more likely to accept it easily.**

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- i. Third parties do not like to read lengthy documents. By carving the Securities and Brokerage Accounts Power of Attorney out of the main document, the brokerage firm is much more likely to accept it easily.**

45. Real Estate Power of Attorney

- i. Third parties do not like to read lengthy documents. By carving the Real Estate Power of Attorney out of the main document, the buyer's attorney or title company is much more likely to accept it easily.**

46. Affidavit of Alternate Agent

- i. The power of attorney document provides that the successor agent succeeds to the authority of the primary agent upon the disability of the primary agent. The document provides simply for certification by the successor agent. This affidavit is designed to serve as proof to third parties**

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that the successor agent is serving due to the disability of the primary agent.

47. HIPAA Authorization Form

48. Letter to Physician re: Health Care Power of Attorney and Living Will

i. Automatically inserted into the Cover Letter.

49. Limited Power of Attorney to Make Gifts

- i. If the agent under a Power of Attorney has the authority to make gifts to himself, this may be construed as a General Power of Appointment. If the agent dies prior to the principal, the assets over which the agent had authority under the Power of Attorney could be included in the taxable estate of the agent. In order to avoid this situation, a Limited Power of Attorney to Make Gifts is useful.**

50. Power of Attorney Appointing Educational Representative

51. Power of Attorney for Minor or Disabled Child

52. Psychiatric Advance Directive

- i. Psychiatric Advance Directives (PADs) are legal documents similar to advance directives given in connection with end-of-life decision making. However, PADs are used to give instructions with respect to preferences for future mental health care treatment. They can also be used to designate a proxy decision maker. A number of states have enacted PAD legislation. In some states, such as Wisconsin, a power of attorney may not be used to authorize mental health treatment.**

PADs are relatively new legal instruments. They arose out of the more typical advance directives pertaining to decisions with respect to end-of-life decision-making. The traditional advance directive has significant

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limitations in the context of mental health. Some states do not permit health care representatives to make mental health decisions. Most states permit a principal to revoke an advance directive. To be effective, a PAD must be irrevocable. In response, at least 25 states have enacted legislation authorizing PADs. By the nature of the mental illness, the judgment of many patients is impaired and their ability to recognize the gravity of their condition and need for intervention is reduced. A PAD executed while the patient is thinking clearly is often very useful.

53. Revocation of Power of Attorney

Advanced Trusts

54. Special Needs Trust

55. SNT Crummey Letter

56. SNT Remainder Beneficiary Letter

57. 2503-c Trust

- i. Includes letter to trustee.

58. Charitable Remainder Annuity Trust (CRAT)

- i. **A Charitable Remainder Annuity Trust is used by a client who is charitably inclined. Clients can achieve a reduction of federal and/or state incomes taxes as well as federal and/or state estate tax. Practitioners are encouraged to use Number Cruncher by Stephan R. Leimberg and Robert T. Leclair. The lower the annuity rate the larger the tax deduction. The client reserves an income stream for the life of the client and/or the client's spouse, but occasionally for the life of a child. Upon the termination of the lifetime income stream, the remaining funds go to the charity.**

It is often beneficial to fund the Charitable Remainder Trust with appreciated assets to avoid payment of capital gains tax.

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To qualify as a Charitable Remainder Annuity Trust, the following conditions must be met:

- a. The trust must pay a specific amount to a non-charitable beneficiary who is living when the trust is established;**
- b. Annuity payments may be made annually, semi-annually, quarterly, monthly or weekly**
- c. The payout must be at least 5% but less than 50% of the initial fair market value of the property placed in the trust. The charity's interest at inception must be worth at least 10% of the value of the assets transferred to the trust;**
- d. The sum is payable annually for the life or lives of non-charitable beneficiaries for a specified term of years not to exceed 20;**
- e. No sum is paid to anyone other than a specified, non-charitable beneficiary and a qualified charitable organization;**
- f. When the specified term ends, the remainder interest is transferred to a qualified charity or is retained by the trust for use of the qualified charity;**
- g. There must be a 5% chance or less that the trust funds will be exhausted before the trust ends.**

59. Charitable Remainder Unitrust (CRUT)

- i. A Charitable Remainder Unitrust is designed to achieve income and gift tax charitable deductions or an estate tax charitable deduction. The principal difference between a Charitable Remainder Unitrust and Charitable Remainder Annuity Trust is that a unitrust pays a varying annuity rather than a fixed amount. The payment is based on annual fluctuations in the value of the trust property. As the value of the trust increases, so does the annuity. If the value of the trust assets decreases, so does the annuity payment. The following conditions must be met:**

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- a. Distributions to the beneficiary must be not less than 5% and not more than 50% of the fair market value;**
- b. The charity's actuarial interest must be at least 10% of any assets transferred to the trust;**
- c. The assets must be revalued annually;**
- d. Payments from the trust must also be made annually for a fixed period of twenty years or less for the lifetime of a non-charitable beneficiary who is living at the beginning of the trust;**
- e. No sum can be paid except for the fixed percentage during the term of the trust.**

60. Conduit Trust

- i. When retirement accounts are paid to a Trust, it is important to preserve the ability to stretch out the IRA distributions. Conduit Trust language should be used.**

61. Grantor Retained Annuity Trust (GRAT)

- i. The Grantor Retained Annuity Trust is designed to achieve estate tax savings. The client transfers assets to an irrevocable trust and retains an income interest from high-yielding and rapidly appreciating property. On the grantor's death the property normally goes to children. The grantor retains an income stream for the grantor's life or for a term of years. A lifetime GRAT is very risky. Distributions are made annually, semi-annually, quarterly, monthly or weekly.**

A letter to the trustee is automatically inserted.

Grantor Retained Annuity Trusts are complicated. Trustees are often laypersons with no tax expertise or trustee experience. It is useful to

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prepare a letter outlining how the trust must operate and the trustee's duties.

Includes letter to trustee.

62. Life Insurance Trust - Single Life and Second to Die

- i. The purpose of the Irrevocable Life Insurance Trust is to save federal estate taxes and state estate taxes, where applicable. The trust must be the owner of the life insurance policy(ies) as well as the beneficiary. If the client does not reserve any incidents of ownership, the life insurance proceeds will not be includable in the client's estate.**

To remove the proceeds of the life insurance policy(ies) from the estate of the grantor, the trust must be irrevocable and the grantor may not serve as trustee. If any existing life insurance policy is assigned to an Irrevocable Life Insurance Trust, the owner must live three (3) years or the proceeds will be brought back into the estate. For that reason, it is best for the trustee to apply for a policy and to be the initial owner and beneficiary. In some cases, existing single life policies will be assigned to an Irrevocable Life Insurance Trust. Where the policy is assigned, the owner/assignor must live three years for the proceeds of the policy to be removed from his or her estate. In other cases, a new single life policy is purchased to replace the income of the deceased client, if necessary for the support of the spouse or children.

Typically, an irrevocable life insurance trust is used for the purpose of generating liquid assets to pay federal or state estate tax. Those funds are not necessary until the death of the surviving spouse. It is much less expensive to purchase second-to-die life insurance because the premium is based on both lives. There is no payout nor any need for a payout on the death of the first spouse.

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Second-to-die life insurance is also used to fund Third Party Special Needs Trusts, but those provisions are contained in the Third Party Special Needs Trust document, which is a part of this system.

Includes letter to trustee.

63. Pet Trust

64. Pet Trust Assignment

65. Qualified Personal Residence Trust (QPRT)

- i. A Qualified Personal Residence Trust (QPRT) is designed to achieve estate tax savings. Using this strategy a parent transfers personal residential real estate to an irrevocable trust and reserve the right to use the property for a term of years. This is a future interest gift and does not qualify for the annual exclusion. This trust is designed to transfer assets to children while incurring little or no estate or gift tax liability. This is a grantor trust so that all income, deductions and credits are treated as if no trust existed. If the grantor dies during the term of the trust, the entire value of the asset is included in the grantor's estate. Therefore, in selecting a term of the trust, the grantor's actual life expectancy should be taken into consideration. The longer the term of the trust the bigger the discount, so long as the grantor outlives the trust term. At the end of the term the grantor must either move out of the property or rent it back from the remainder beneficiaries at fair market value.**

ii. Includes letter to trustee.

66. Retirement Plan Trust

67. Children's Irrevocable Grantor Trust

- i. Letter to: Trustee re: Sign Children's Trust
- ii. Letter to: Trustee re: Children's Trust

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- iii. Letter to: Client re: Original Children's Trust

Other Planning Documents

68. Directions with Respect to Remains

- i. A Direction with Respect to Disposition of Remains is a document that is often used in situations where there is a same-sex couple. In some states family members have the right to make decisions with respect to disposition of remains.

69. Designation of Beneficiary for IRA Account

70. Domestic Partnership Agreement

- i. A Domestic Partnership Agreement is designed for same-sex couples. It covers important financial issues, which are part of these relationships. Application for Domestic Partnership status applies only in states that have Domestic Partnership statutes. The Domestic Partnership Agreement can also be used in situations where there is an unmarried heterosexual relationship.

71. Escrow Agreement

72. Escrow Agreement - Principal and Physician Certification

73. Family Limited Partnership

74. Family Limited Partnership Cover Letter

75. Funding Letters/Letters Retitling Assets or Changing Beneficiary Designations

76. Letter to Financial Institution - POD or TOD Designation

77. Gift Tax Form

78. Gift Tax Letter

79. Letter to Attorney re: Deed

80. Letter to Physician re: Capacity

81. LLC Vacation Home

- i. Limited Liability Company Vacation Home

82. Memo to Document File Checklist - Incompetence

83. Memo to Document File Checklist - Undue Influence

84. Prenuptial Agreement

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- i. A Prenuptial Agreement is designed to establish rights of parties who are marrying. Typically it is used where one party has significant assets and the other does not, in second marriage situations, or in situations where there is a family business. To ensure enforcement of a Prenuptial Agreement is adequate disclosure of each party's assets. It is also important to have the Prenuptial Agreement executed well before the wedding so that there cannot be a later claim of undue influence. It is also important that parties be represented by separate counsel.

85. Statement of Priority of Visitation Rights

Tax Forms

86. 2848

- i. Attorney's names edited separately

87. SS-4

88. W-9

- i. Clients should periodically update their Estate Planning documents. Clients dislike being asked the same information over and again. This form is designed to focus the client on those circumstances which have changed since the last estate plan that may require revision to the estate plan and/or documents.

89. This form is not suitable to an Estate Planning client for whom the firm did not do the original estate plan.

Cover Letter

90. Cover Letter

91. Cover Letter - Simple

92. Direction for Placement of Original Will (and Trust, if applicable)

93. Portofilio

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Closing and Update Appointments

- 94. Answer File Summary
- 95. Annual Maintenance Questionnaire - Married
- 96. Annual Maintenance Questionnaire - Single
- 97. Letter Regarding Update Appointment
- 98. Tax Seminar Follow-up
- 99. Disengagement Letter

Marketing

- 100. Estate Planning Update Invitation – Letter

Docs My Way[©]

- 101. Docs My Way[©] is designed for you to have the option to make textual edits to the templates in the Estate Planning System. Please read the entire User's Guide prior to making any edits to the templates. Any edits that you make in the Docs My Way[©] folder will be retained in future releases of the software. However, be sure that you are editing the appropriate document (document in the Docs My Way[©] folder) as other documents in the system are overwritten with each release. If you would like to make programming changes to the documents, please contact us for a referral for our preferred programmer.

Custom Templates

- 102. Directions to Office
- 103. Document Title Page Insert - Customized
- 104. Estate Planning Questionnaire - Single Client - Customized
- 105. Estate Planning Questionnaire - Single With Partner - Customized

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- 106. Estate Planning Qesstionnaire - Married Client - Customized
- 107. Questionnaire for Pet Supplemental Information - Customized
- 108. Questionnaire for Pet Supplemental Information - Customized
- 109. Questionnaire for Special Circumstances - Customized
- 110. Will - Accounting
- 111. Trust - Revocable - Accounting - Tax Planning - Client
- 112. Trust - Revocable - Accounting - Tax Planning - Client
- 113. Trust - Revocable - Accounting - No Tax Planning - Client and Spouse
- 114. Will - Accounting
- 115. Will - Remaining Tangible Personal Property - Client
- 116. Will - Remaining Tangible Personal Property - Spouse

Acknowledgments, Notary Blocks and Other Inserts

- 117. Acknowledgments
 - i. Exist for each state
- 118. Notary Blocks
 - i. Exist for each state
- 119. Other Inserts
 - i. Document Title Page Insert
 - ii. Document Title Page Insert - standard
 - iii. Letter Signing Insert
 - iv. Letter Signing No Contact Insert
 - v. Letterhead Insert
 - vi. Letterhead Insert - Standard
 - vii. Witness Block

Decision Trees

- 120. Basic Documents Decision Tree

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- i. Each document has a corresponding Decision Tree. The Decision Tree provides the series of questions that appear in the dialog boxes. They are a concise “roadmap” of the document’s logic, style and contents. Decision Trees are selected, printed, and taken to client meetings. The Decision Trees prompt you to ask the appropriate questions so the discovery process works efficiently. They ensure accuracy and reduce the number of return conversations with the client for more information.

121. Decision Trees have all the questions necessary to create a document.

122. Additional Documents Decision Tree

State Specific Documents

123. Arizona

- i. AZ Special Warranty Deed
- ii. AZ Financial Durable Power of Attorney
- iii. AZ Health Care Power of Attorney
- iv. AZ HIPAA Medical Records Release
- v. AZ Living Will
- vi. AZ Prehospital Medical Care Directives

124. California

- i. CA Quit Claim Deed
- ii. CA Advance Health Care Directives

125. Colorado

- i. CO Financial Durable Power of Attorney
- ii. CO Living Will
- iii. CO Medical Durable Power of Attorney

126. Connecticut

- i. CT Durable Power of Attorney
- ii. CT Quit Claim Deed

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- iii. CT Warranty Deed
- 127. DC
 - i. Real Property Recordation and Transfer Tax Form FP 7/c
- 128. Florida
 - i. FL Quit Claim Deed
 - ii. FL Warranty Deed
 - iii. FL Affidavit of Attorney for General Durable Power of Attorney
 - iv. FL Affidavit of Witness to Last Will
 - v. FL Burial Account Statement
 - vi. FL Designation of Health Care Proxy
 - vii. FL Designation of Health Care Surrogate
 - viii. FL Designation of Health Care surrogate with Living Will
 - ix. FL Durable Power of Attorney for Property Management
 - x. FL Health Care Advanced Directives Card
 - xi. FL HIPAA Form
 - xii. FL Living Will
 - xiii. FL Self Proof Will
 - xiv. FL Uniform Donor Form
- 129. Georgia
 - i. GA Durable Financial Power of Attorney
 - ii. GA Durable Financial Power of Attorney
 - iii. GA Advanced Directive for Health Care
- 130. Idaho
 - i. ID Deed
- 131. Illinois
 - i. IL Deed
 - ii. IL Living Will
 - iii. IL Short Form Power of Attorney for Health Care
 - iv. IL Statutory Short Form Power of Attorney for Property
- 132. Indiana
 - i. IN Quit Claim Deed
 - ii. IN Life Prolonging Procedures Declaration

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- iii. IN Living Will Declaration
- 133. Maine
 - i. ME Quit Claim Deed
 - ii. ME Acceptance of Responsibilities Under the Durable Financial Power of Attorney for Agent
 - iii. ME Acceptance of Responsibilities Under the Health Care Power of Attorney Agent
 - iv. ME Advance of Health Care Directives
- 134. Maryland
 - i. MD Advance Health Care Directive 2009
 - ii. MD Limited Power of Attorney 2010
 - iii. MD General Durable Power of Attorney 2010
 - iv. MD Affidavit of Residence
 - v. MD Notice of Revocable Trust Becoming Irrevocable
 - vi. MD Deed
- 135. Massachusetts
 - i. MA Health Care Proxy
- 136. Mississippi
 - i. MI Deed Reserving Life Estate
 - ii. MI Quit Claim Deed
 - iii. MI Certificate of Trust Existence and Authority
- 137. Missouri
 - i. MO Deed of Trust
- 138. New Jersey
 - i. NJ Nonresident Seller's Tax Declaration
 - ii. NJ Seller's Residency Certification/Exemption
 - iii. NJ Deed from Parent to Child(ren)
 - iv. NJ Affidavit of Consideration
 - v. NJ Seller Resident Certification
 - vi. NJ Nonresident Seller's Tax Declaration
- 139. New York
 - i. NY Deed

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- ii. NY General Health Care Proxy
- iii. NY Health Care Proxy
- iv. NY Living Will
- 140. North Carolina
 - i. NC Deed
 - ii. NC Declaration of a Desire for a Natural Death
 - iii. NC Health Care Power of Attorney
 - iv. NC Short Form POA
- 141. North Dakota
 - i. ND Health Care Power of Attorney
 - ii. ND Power of Attorney
- 142. Ohio
 - i. OH Living Will and Healthcare Power of Attorney
 - ii. OH General Warranty Deed
 - iii. OH Quit Claim Deed
 - iv. OH Survivorship Deed
 - v. Oh Transfer on Death Deed
 - vi. OH Affidavit to Transfer/Contingent Transfer Real Property on Death of Beneficiary
 - vii. OH Organ and Tissue Donation Form
- 143. Pennsylvania
 - i. PA Health Care Power of Attorney
 - ii. PA Deed
 - iii. PA Durable Health Care Power of Attorney
 - iv. Philadelphia, PA Real Estate Transfer Tax Certification
 - v. Philadelphia, PA Recording Information Summary
 - vi. PA Realty Transfer Tax Statement of Value For
 - vii. PA living Will
- 144. South Carolina
 - i. SC Deed Reserving Life Estate
 - ii. SC Deed for Joint Tenants
 - iii. SC Deed to Spouse

Master Document List

Descriptions Included

- iv. SC Affidavit
- v. SC Declaration of a Desire for a Natural Death
- vi. SC Health Care Power of Attorney
- 145. Tennessee
 - i. TN Quit Claim Deed
 - ii. TN Warranty Deed
- 146. Texas
 - i. TX Warranty Deed
 - ii. TX Executor's Deed
 - iii. TX Directive to Physicians and Family or Surrogates
 - iv. TX DNR
 - v. TX Durable Power of Attorney
 - vi. TX Medical Power of Attorney
- 147. Utah
 - i. UT Quit Claim Deed
 - ii. UT Advance Health Care Directive
 - 1. Pursuant to Utah Code Sections 75-2a-100 et. seq.
 - iii. Utah Advanced Health Care Directive Instructions
 - iv. UT Health Care Power of Attorney
 - v. UT Living Will
- 148. Vermont
 - i. VT Warranty Deed
 - ii. VT Property Transfer Tax Return
 - iii. VT Durable Power of Attorney
- 149. Virginia
 - i. VA Deed of Bargain and Sale
 - ii. VA Deed of Gift
- 150. Washington
 - i. WA Quit Claim Deed
 - ii. WA Durable Power of Attorney for Health Care
 - iii. WA Health Care Directive