

Lipman's Wills & Trusts

This volume, comprised of more than 340 automated forms, is sophisticated enough for any high-end estate planning, yet flexible enough to cover smaller estates. The forms in this volume cover estate planning, domestic partnerships, living wills, irrevocable trusts, buy-sell agreements and even pre- & post-marital property agreements. The volume is authored by Ronald L. Lipman, Board Certified in Estate Planning and Probate Law by the Texas Board of Legal Specialization.

CH. 1 -- HUSBAND'S WILLS

- 1-1 Simple - short version (Husband's Will)
- 1-2 Simple - long version (Husband's Will)
- 1-3 Pourover - short version (Husband's Will)
- 1-4 Pourover - long version (Husband's Will)
- 1-5 Bypass Trust only - no marital trust (Husband's Will)
- 1-6 Bypass & QTIP (Husband's Will)
- 1-7 Bypass & optional QTIP & separate share trusts (Husband's Will)
- 1-8 Bypass & QTIP with GST exempt trusts (Husband's Will)
- 1-9 Bypass & QTIP with GST exempt & nonexempt trusts (Husband's Will)

CH. 2 -- WIFE'S WILLS

- 2-1 Simple - short version (Wife's Will)
- 2-2 Simple - long version (Wife's Will)
- 2-3 Pourover - short version (Wife's Will)
- 2-4 Pourover - long version (Wife's Will)
- 2-5 Bypass Trust only - no marital trust (Wife's Will)
- 2-6 Bypass & QTIP (Wife's Will)
- 2-7 Bypass & optional QTIP & separate share trusts (Wife's Will)
- 2-8 Bypass & QTIP with GST exempt trusts (Wife's Will)
- 2-9 Bypass & QTIP with GST exempt & nonexempt trusts (Wife's Will)

CH. 3 -- INDIVIDUAL'S WILLS

- 3-1 Simple (Indiv's Will)
- 3-2 Pourover - short version (Indiv's Will)
- 3-3 Pourover - long version (Indiv's Will)
- 3-4 Family - Sprinkle Trust (Indiv's Will)
- 3-5 Separate Share Trusts (Indiv's Will)
- 3-6 Separate Share Trusts - GST exempt trusts only (Indiv's Will)
- 3-7 Separate Share GST exempt & nonexempt trusts (Indiv's Will)

CH. 4 -- DOMESTIC PARTNER NO. ONE'S WILLS

- 4-1 Simple (DP #1's Will)
- 4-2 Pourover - short version (DP #1's Will)
- 4-3 Pourover - long version (DP #1's Will)
- 4-4 Trust for Partner, then separate share trusts (DP #1's Will)
- 4-5 Separate Share Trusts for one or more benefs (DP #1's Will)

CH. 5 -- DOMESTIC PARTNER NO. TWO'S WILLS

- 5-1 Simple (DP #2's Will)
- 5-2 Pourover - short version (DP #2's Will)
- 5-3 Pourover - long version (DP #2's Will)
- 5-4 Trust for Partner, then separate share trusts (DP #2's Will)
- 5-5 Separate Share Trusts for one or more benefs (DP #2's Will)

CH. 6 -- HUSBAND'S MISCELLANEOUS DOCUMENTS

- 6-1 Durable Power of Attorney (Husband)
- 6-1(a) Notice to Person Executing Durable Power of Attorney (Husband)
- 6-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact (Husband)
- 6-1(c) Affidavit of Agent (Husband)
- 6-1(d) Affidavit of Physician (that Husband lacks capacity)
- 6-1(e) California Probate Code Provisions (Husband)
- 6-2 Advance Health Care Directive (Husband)
- 6-3 HIPAA Release (Husband)
- 6-4 Codicil (Husband)
- 6-5 Revocation of Power of Attorney (Husband)
- 6-6 Video Will Checklist (Husband)
- 6-7 Nomination of Conservator (Husband)
- 6-8 Declaration For Mental Health Treatment (Husband)
- 6-9 Designation of Health Care Agent for Children (Husband)
- 6-10 Nomination of Guardian For Children (Husband)
- 6-11 Memorandum Regarding Personal Belongings (Husband)

CH. 7 -- WIFE'S MISCELLANEOUS DOCUMENTS

- 7-1 Durable Power of Attorney (Wife)
- 7-1(a) Notice to Person Executing Durable Power of Attorney (Wife)
- 7-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact (Wife)
- 7-1(c) Affidavit of Agent (Wife)
- 7-1(d) Affidavit of Physician (that Wife lacks capacity)
- 7-1(e) California Probate Code Provisions (Wife)
- 7-2 Advance Health Care Directive (Wife)
- 7-3 HIPAA Release (Wife)
- 7-4 Codicil (Wife)
- 7-5 Revocation of Power of Attorney (Wife)
- 7-6 Video Will Checklist (Wife)
- 7-7 Nomination of Conservator (Wife)
- 7-8 Declaration For Mental Health Treatment (Wife)
- 7-9 Designation of Health Care Agent for Children (Wife)
- 7-10 Nomination of Guardian For Children (Wife)
- 7-11 Memorandum Regarding Personal Belongings (Wife)

CH. 8 -- INDIVIDUAL'S MISCELLANEOUS DOCUMENTS

- 8-1 Durable Power of Attorney (Indiv)
- 8-1(a) Notice to Person Executing Durable Power of Attorney (Indiv)
- 8-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact (Indiv)
- 8-1(c) Affidavit of Agent (Indiv)
- 8-1(d) Affidavit of Physician (that Indiv lacks capacity)
- 8-1(e) California Probate Code Provisions (Indiv)
- 8-2 Advance Health Care Directive (Indiv)
- 8-3 HIPAA Release (Indiv)

- 8-4 Codicil (Indiv)
- 8-5 Revocation of Power of Attorney (Indiv)
- 8-6 Video Will Checklist (Indiv)
- 8-7 Nomination of Conservator (Indiv)
- 8-8 Declaration For Mental Health Treatment (Indiv)
- 8-9 Designation of Health Care Agent for Children (Indiv)
- 8-10 Nomination of Guardian For Children (Indiv)
- 8-11 Memorandum Regarding Personal Belongings (Indiv)

CH. 9 -- DOMESTIC PARTNER NO. ONE'S MISC DOCUMENTS

- 9-1 Durable Power of Attorney (DP #1)
- 9-1(a) Notice to Person Executing Durable Power of Attorney (DP #1)
- 9-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact (DP #1)
- 9-1(c) Affidavit of Agent (DP #1)
- 9-1(d) Affidavit of Physician (that DP #1 lacks capacity)
- 9-1(e) California Probate Code Provisions (DP #1)
- 9-2 Advance Health Care Directive (DP #1)
- 9-3 HIPAA Release (DP #1)
- 9-4 Codicil (DP #1)
- 9-5 Revocation of Power of Attorney (DP #1)
- 9-6 Video Will Checklist (DP #1)
- 9-7 Nomination of Conservator (DP #1)
- 9-8 Declaration For Mental Health Treatment (DP #1)
- 9-9 Designation of Health Care Agent for Children (DP #1)
- 9-10 Nomination of Guardian For Children (DP #1)
- 9-11 Memorandum Regarding Personal Belongings (DP #1)

CH. 10 -- DOMESTIC PARTNER NO. TWO'S MISC DOCUMENTS

- 10-1 Durable Power of Attorney (DP #2)
- 10-1(a) Notice to Person Executing Durable Power of Attorney (DP #2)
- 10-1(b) Notice to Person Accepting Appointment as Attorney-in-Fact (DP #2)
- 10-1(c) Affidavit of Agent (DP #2)
- 10-1(d) Affidavit of Physician (that DP #2 lacks capacity)
- 10-1(e) California Probate Code Provisions (DP #2)
- 10-2 Advance Health Care Directive (DP #2)
- 10-3 HIPAA Release (DP #2)
- 10-4 Codicil (DP #2)
- 10-5 Revocation of Power of Attorney (DP #2)
- 10-6 Video Will Checklist (DP #2)
- 10-7 Nomination of Conservator (DP #2)
- 10-8 Declaration For Mental Health Treatment (DP #2)
- 10-9 Designation of Health Care Agent for Children (DP #2)
- 10-10 Nomination of Guardian For Children (DP #2)
- 10-11 Memorandum Regarding Personal Belongings (DP #2)

CH. 11 -- HUSB & WIFE'S REVOCABLE LIVING TRUSTS

- 11-1 Pourover to Estate of Deceased Settlor (H&W's Rev Trust)
- 11-2 Simple - outright to benefs (H&W's Rev Trust)
- 11-3 Simple - with separate share trusts (H&W's Rev Trust)
- 11-4 Bypass & QTIP (H&W's Rev Trust)
- 11-5 Bypass & optional QTIP & separate share trusts (H&W's Rev Trust)
- 11-6 Bypass & QTIP with GST exempt trusts (H&W's Rev Trust)
- 11-7 Bypass & QTIP with GST exempt & nonexempt trusts (H&W's Rev Trust)

CH. 12 -- HUSBAND'S REVOCABLE LIVING TRUSTS

- 12-2 Simple - outright to benefs (Husband's Rev Trust)
- 12-3 Simple - with separate share trusts (Husband's Rev Trust)
- 12-4 Bypass & QTIP (Husband's Rev Trust)
- 12-5 Bypass & optional QTIP & separate share trusts (Husband's Rev Trust)
- 12-6 Bypass & QTIP with GST exempt trusts (Husband's Rev Trust)
- 12-7 Bypass & QTIP with GST exempt & nonexempt trusts (Husband's Rev Trust)

CH. 13 -- WIFE'S REVOCABLE LIVING TRUSTS

- 13-2 Simple - outright to benefs (Wife's Rev Trust)
- 13-3 Simple - with separate share trusts (Wife's Rev Trust)
- 13-4 Bypass & QTIP (Wife's Rev Trust)
- 13-5 Bypass & optional QTIP & separate share trusts (Wife's Rev Trust)
- 13-6 Bypass & QTIP with GST exempt trusts (Wife's Rev Trust)
- 13-7 Bypass & QTIP with GST exempt & nonexempt trusts (Wife's Rev Trust)

CH. 14 -- INDIVIDUAL'S REVOCABLE LIVING TRUSTS

- 14-1 Pourover to Estate (Indiv's Rev Trust)
- 14-2 Simple - outright to beneficiaries (Indiv's Rev Trust)
- 14-3 Family - Sprinkle Trust (Indiv's Rev Trust)
- 14-4 Separate Share Trusts (Indiv's Rev Trust)

CH. 15 -- DOMESTIC PARTNER NO. ONE'S REVOCABLE LIVING TRUSTS

- 15-2 Simple - outright to beneficiaries (DP #1's Rev Trust)
- 15-3 Trust for partner, then separate share trusts (DP #1's Rev Trust)
- 15-4 Separate Share Trusts for one or more benefs (DP #1's Rev Trust)

CH. 16 -- DOMESTIC PARTNER NO. TWO'S REVOCABLE LIVING TRUSTS

- 16-2 Simple - outright to beneficiaries (DP #2's Rev Trust)
- 16-3 Trust for partner, then separate share trusts (DP #2's Rev Trust)
- 16-4 Separate Share Trusts for one or more benefs (DP #2's Rev Trust)

CH. 17 -- HUSB & WIFE'S MISCELLANEOUS REV TRUST FORMS

- 17-1 Memorandum Regarding Funding of Rev Trust (H&W)
- 17-2 Deed Transferring Property to Revocable Trust (H&W)
- 17-3 Letter to Lender Re. Transfer of Account to Rev Trust (H&W)
- 17-4 Certification of Trust (for H&W's Rev Trust)
- 17-5 Memorandum Regarding Transfer of Accounts (H&W)
- 17-6 Assignment of Property to Revocable Trust (H&W)
- 17-7 Amendment to Revocable Trust (H&W)

CH. 18 -- HUSB'S MISCELLANEOUS REV TRUST FORMS

- 18-1 Memorandum Regarding Funding of Rev Trust (Husband)
- 18-2 Deed Transferring Property to Revocable Trust (Husband)
- 18-3 Letter to Lender Re. Transfer of Account to Rev Trust (Husband)
- 18-4 Certification of Trust (for Husband's Rev Trust)
- 18-5 Memorandum Regarding Transfer of Accounts (Husband)

- 18-6 Assignment of Property to Revocable Trust (Husband)
 18-7 Amendment to Revocable Trust (Husband)

CH. 19 -- WIFE'S MISCELLANEOUS REV TRUST FORMS

- 19-1 Memorandum Regarding Funding of Rev Trust (Wife)
 19-2 Deed Transferring Property to Revocable Trust (Wife)
 19-3 Letter to Lender Re. Transfer of Account to Rev Trust (Wife)
 19-4 Certification of Trust (for Wife's Rev Trust)
 19-5 Memorandum Regarding Transfer of Accounts (Wife)
 19-6 Assignment of Property to Revocable Trust (Wife)
 19-7 Amendment to Revocable Trust (Wife)

CH. 20 -- INDIV'S MISCELLANEOUS REV TRUST FORMS

- 20-1 Memorandum Regarding Funding of Rev Trust (Indiv)
 20-2 Deed Transferring Property to Revocable Trust (Indiv)
 20-3 Letter to Lender Re. Transfer of Account to Rev Trust (Indiv)
 20-4 Certification of Trust (for Indiv's Rev Trust)
 20-5 Memorandum Regarding Transfer of Accounts (Indiv)
 20-6 Assignment of Property to Revocable Trust (Indiv)
 20-7 Amendment to Revocable Trust (Indiv)

CH. 21 -- DOMESTIC PARTNER #1'S MISC REV TRUST FORMS

- 21-1 Memorandum Regarding Funding of Rev Trust (DP #1)
 21-2 Deed Transferring Property to Revocable Trust (DP #1)
 21-3 Letter to Lender Re. Transfer of Account to Rev Trust (DP #1)
 21-4 Certification of Trust (for DP #1's Rev Trust)
 21-5 Memorandum Regarding Transfer of Accounts (DP #1)
 21-6 Assignment of Property to Revocable Trust (DP #1)
 21-7 Amendment to Revocable Trust (DP #1)

CH. 22 -- DOMESTIC PARTNER #2'S MISC REV TRUST FORMS

- 22-1 Memorandum Regarding Funding of Rev Trust (DP #2)
 22-2 Deed Transferring Property to Revocable Trust (DP #2)
 22-3 Letter to Lender Re. Transfer of Account to Rev Trust (DP #2)
 22-4 Certification of Trust (for DP #2's Rev Trust)
 22-5 Memorandum Regarding Transfer of Accounts (DP #2)
 22-6 Assignment of Property to Revocable Trust (DP #2)
 22-7 Amendment to Revocable Trust (DP #2)

CH. 23 -- INVESTMENT TRUSTS (IDGT optional)

- 23-1 SEPARATE INVESTMENT TRUSTS - no insurance (H&W settlors)
 23-1(a) Memorandum Regarding Funding of Trust (for Form 23-1)
 23-1(b) Withdrawal Letters (for Form 23-1)
 23-1(c) Form to Alter Withdrawal Rights (for Form 23-1)
 23-1(d) Certification of Trust (for Form 23-1)
 23-2 INVESTMENT "SPRINKLE" TRUST - no insurance (H&W settlors)
 23-2(a) Memorandum Regarding Funding of Trust (for Form 23-2)

- 23-2(b) Withdrawal Letters (for Form 23-2)
 23-2(c) Form to Alter Withdrawal Rights (for Form 23-2)
 23-2(d) Certification of Trust (for Form 23-2)
 23-3 SEPARATE INVESTMENT TRUSTS - no insurance (Indiv settlor)
 23-3(a) Memorandum Regarding Funding of Trust (for Form 23-3)
 23-3(b) Withdrawal Letters (for Form 23-3)
 23-3(c) Form to Alter Withdrawal Rights (for Form 23-3)
 23-3(d) Certification of Trust (for Form 23-3)
 23-4 INVESTMENT "SPRINKLE" TRUST - no insurance (Indiv settlor)
 23-4(a) Memorandum Regarding Funding of Trust (for Form 23-4)
 23-4(b) Withdrawal Letters (for Form 23-4)
 23-4(c) Form to Alter Withdrawal Rights (for Form 23-4)
 23-4(d) Certification of Trust (for Form 23-4)

CH. 24 -- S CORPORATION TRUSTS

- 24-1 QUALIFIED S CORPORATION TRUSTS (H&W settlors)
 24-1(a) Memorandum Regarding Funding of Trust (for Form 24-1)
 24-1(b) Withdrawal Letters (for Form 24-1)
 24-1(c) Form to Alter Withdrawal Rights (for Form 24-1)
 24-1(d) Certification of Trust (for Form 24-1)
 24-2 QUALIFIED S CORPORATION TRUSTS (Indiv settlor)
 24-2(a) Memorandum Regarding Funding of Trust (for Form 24-2)
 24-2(b) Withdrawal Letters (for Form 24-2)
 24-2(c) Form to Alter Withdrawal Rights (for Form 24-2)
 24-2(d) Certification of Trust (for Form 24-2)

CH. 25 -- GRANDCHILDREN'S TRUSTS

- 25-1 GRANDCHILDREN'S TRUSTS - GST qualifying (H&W settlors)
 25-1(a) Memorandum Regarding Funding of Trust (for Form 25-1)
 25-1(b) Withdrawal Letters (for Form 25-1)
 25-1(c) Form to Alter Withdrawal Rights (for Form 25-1)
 25-1(d) Certification of Trust (for Form 25-1)
 25-2 GRANDCHILDREN'S TRUSTS - GST qualifying (Indiv settlor)
 25-2(a) Memorandum Regarding Funding of Trust (for Form 25-2)
 25-2(b) Withdrawal Letters (for Form 25-2)
 25-2(c) Form to Alter Withdrawal Rights (for Form 25-2)
 25-2(d) Certification of Trust (for Form 25-2)

CH. 26 -- LIFE INSURANCE TRUSTS

- 26-1 SECOND TO DIE LIFE INSURANCE TRUST (H&W settlors)
 26-1(a) Memorandum Regarding Funding of Trust (for Form 26-1)
 26-1(b) Withdrawal Letters (for Form 26-1)
 26-1(c) Form to Alter Withdrawal Rights (for Form 26-1)
 26-1(d) Letter to Insurance Agent (for Form 26-1)
 26-1(e) Certification of Trust (for Form 26-1)
 26-2 WIFE PRIMARY BENEF LIFE INS TRUST - Ins on Husb (Husband settlor)
 26-2(a) Memorandum Regarding Funding of Trust (for Form 26-2)
 26-2(b) Withdrawal Letters (for Form 26-2)
 26-2(c) Form to Alter Withdrawal Rights (for Form 26-2)
 26-2(d) Letter to Insurance Agent (for Form 26-2)
 26-2(e) Certification of Trust (for Form 26-2)
 26-2(f) Transmutation Agreement for Insurance Policies (for Form 26-2)

- 26-2(g) Transmutation Agreement for Cash (for Form 26-2)
26-3 HUSB PRIMARY BENEF LIFE INS TRUST - Ins on Wife (Wife settlor)
- 26-3(a) Memorandum Regarding Funding of Trust (for Form 26-3)
26-3(b) Withdrawal Letters (for Form 26-3)
26-3(c) Form to Alter Withdrawal Rights (for Form 26-3)
26-3(d) Letter to Insurance Agent (for Form 26-3)
26-3(e) Certification of Trust (for Form 26-3)
26-3(f) Transmutation Agreement for Insurance Policies (for Form 26-3)
- 26-3(g) Transmutation Agreement for Cash (for Form 26-3)
26-4 LIFE INS TRUSTS FOR CHILDREN - Insurance on Husb (H&W settlors)
- 26-4(a) Memorandum Regarding Funding of Trust (for Form 26-4)
26-4(b) Withdrawal Letters (for Form 26-4)
26-4(c) Form to Alter Withdrawal Rights (for Form 26-4)
26-4(d) Letter to Insurance Agent (for Form 26-4)
26-4(e) Certification of Trust (for Form 26-4)
- 26-5 LIFE INS TRUSTS FOR CHILDREN - Insurance on Wife (H&W settlors)
- 26-5(a) Memorandum Regarding Funding of Trust (for Form 26-5)
26-5(b) Withdrawal Letters (for Form 26-5)
26-5(c) Form to Alter Withdrawal Rights (for Form 26-5)
26-5(d) Letter to Insurance Agent (for Form 26-5)
26-5(e) Certification of Trust (for Form 26-5)
- 26-6 LIFE INS "SPRINKLE" TRUST - Ins on H&W (H&W settlors)
- 26-6(a) Memorandum Regarding Funding of Trust (for Form 26-6)
26-6(b) Withdrawal Letters (for Form 26-6)
26-6(c) Form to Alter Withdrawal Rights (for Form 26-6)
26-6(d) Letter to Insurance Agent (for Form 26-6)
26-6(e) Certification of Trust (for Form 26-6)
- 26-7 LIFE INS TRUSTS FOR CHILDREN (Indiv settlor)
- 26-7(a) Memorandum Regarding Funding of Trust (for Form 26-7)
26-7(b) Withdrawal Letters (for Form 26-7)
26-7(c) Form to Alter Withdrawal Rights (for Form 26-7)
26-7(d) Letter to Insurance Agent (for Form 26-7)
26-7(e) Certification of Trust (for Form 26-7)
- 26-8 LIFE INS "SPRINKLE" TRUST - Ins on Indiv (Indiv settlor)
- 26-8(a) Memorandum Regarding Funding of Trust (for Form 26-8)
26-8(b) Withdrawal Letters (for Form 26-8)
26-8(c) Form to Alter Withdrawal Rights (for Form 26-8)
26-8(d) Letter to Insurance Agent (for Form 26-8)
26-8(e) Certification of Trust (for Form 26-8)

CH. 27 -- QUALIFIED PERSONAL RESIDENCE TRUSTS

- 27-1 QUALIFIED PERSONAL RESIDENCE TRUST (H&W settlors)
- 27-1(a) Memorandum Regarding Funding of Trust (for Form 27-1)
27-1(b) Deed Transferring Home to Trust (for Form 27-1)
27-1(c) Certification of Trust (for Form 27-1)
- 27-2 QUALIFIED PERSONAL RESIDENCE TRUST (Husband settlor)
- 27-2(a) Memorandum Regarding Funding of Trust (for Form 27-2)
27-2(b) Deed Transferring Home to Trust (for Form 27-2)
27-2(c) Certification of Trust (for Form 27-2)
- 27-3 QUALIFIED PERSONAL RESIDENCE TRUST (Wife settlor)

- 27-3(a) Memorandum Regarding Funding of Trust (for Form 27-3)
27-3(b) Deed Transferring Home to Trust (for Form 27-3)
27-3(c) Certification of Trust (for Form 27-3)
- 27-4 QUALIFIED PERSONAL RESIDENCE TRUST (Indiv settlor)
- 27-4(a) Memorandum Regarding Funding of Trust (for Form 27-4)
27-4(b) Deed Transferring Home to Trust (for Form 27-4)
27-4(c) Certification of Trust (for Form 27-4)

CH. 28 -- CHARITABLE REMAINDER ANNUITY TRUSTS

- 28-1 CHARITABLE REMAINDER ANNUITY TRUST (H&W settlors)
- 28-1(a) Memorandum Regarding Funding of Trust (for Form 28-1)
28-1(b) Certification of Trust (for Form 28-1)
- 28-2 CHARITABLE REMAINDER ANNUITY TRUST (Husband settlor)
- 28-2(a) Memorandum Regarding Funding of Trust (for Form 28-2)
28-2(b) Certification of Trust (for Form 28-2)
- 28-3 CHARITABLE REMAINDER ANNUITY TRUST (Wife settlor)
- 28-3(a) Memorandum Regarding Funding of Trust (for Form 28-3)
28-3(b) Certification of Trust (for Form 28-3)
- 28-4 CHARITABLE REMAINDER ANNUITY TRUST (Indiv settlor)
- 28-4(a) Memorandum Regarding Funding of Trust (for Form 28-4)
28-4(b) Certification of Trust (for Form 28-4)

CH. 29 -- CHARITABLE REMAINDER UNITRUSTS

- 29-1 CHARITABLE REMAINDER UNITRUST (H&W settlors)
- 29-1(a) Memorandum Regarding Funding of Trust (for Form 29-1)
29-1(b) Certification of Trust (for Form 29-1)
- 29-2 CHARITABLE REMAINDER UNITRUST (Husband settlor)
- 29-2(a) Memorandum Regarding Funding of Trust (for Form 29-2)
29-2(b) Certification of Trust (for Form 29-2)
- 29-3 CHARITABLE REMAINDER UNITRUST (Wife settlor)
- 29-3(a) Memorandum Regarding Funding of Trust (for Form 29-3)
29-3(b) Certification of Trust (for Form 29-3)
- 29-4 CHARITABLE REMAINDER UNITRUST (Indiv settlor)
- 29-4(a) Memorandum Regarding Funding of Trust (for Form 29-4)
29-4(b) Certification of Trust (for Form 29-4)

CH. 30 -- GRANTOR RETAINED ANNUITY TRUSTS

- 30-1 GRANTOR RETAINED ANNUITY TRUST (Husband settlor)
- 30-1(a) Memorandum Regarding Funding of Trust (for Form 30-1)
30-1(b) Certification of Trust (for Form 30-1)
- 30-2 GRANTOR RETAINED ANNUITY TRUST (Wife settlor)
- 30-2(a) Memorandum Regarding Funding of Trust (for Form 30-2)
30-2(b) Certification of Trust (for Form 30-2)
- 30-3 GRANTOR RETAINED ANNUITY TRUST (Indiv settlor)

- 30-3(a) Memorandum Regarding Funding of Trust (for Form 30-3)
 30-3(b) Certification of Trust (for Form 30-3)

CH. 31 -- GRANTOR RETAINED UNITRUSTS

- 31-1 GRANTOR RETAINED UNITRUST (Husband settlor)
 31-1(a) Memorandum Regarding Funding of Trust (for Form 31-1)
 31-1(b) Certification of Trust (for Form 31-1)
 31-2 GRANTOR RETAINED UNITRUST (Wife settlor)
 31-2(a) Memorandum Regarding Funding of Trust (for Form 31-2)
 31-2(b) Certification of Trust (for Form 31-2)
 31-3 GRANTOR RETAINED UNITRUST (Indiv settlor)
 31-3(a) Memorandum Regarding Funding of Trust (for Form 31-3)
 31-3(b) Certification of Trust (for Form 31-3)

CH. 32 -- SUPPLEMENTAL NEEDS TRUSTS -- (d)(4)(A) optional

- 32-1 SUPPLEMENTAL NEEDS TRUST (H&W settlors)
 32-1(a) Memorandum Regarding Funding of Trust (for Form 32-1)
 32-1(b) Certification of Trust (for Form 32-1)
 32-2 SUPPLEMENTAL NEEDS TRUST (Husband settlor)
 32-2(a) Memorandum Regarding Funding of Trust (for Form 32-2)
 32-2(b) Certification of Trust (for Form 32-2)
 32-3 SUPPLEMENTAL NEEDS TRUST (Wife settlor)
 32-3(a) Memorandum Regarding Funding of Trust (for Form 32-3)
 32-3(b) Certification of Trust (for Form 32-3)
 32-4 SUPPLEMENTAL NEEDS TRUST (Indiv settlor)
 32-4(a) Memorandum Regarding Funding of Trust (for Form 32-4)
 32-4(b) Certification of Trust (for Form 32-4)

CH. 42 -- BUY SELL AGREEMENTS

- 42-1 Wait and See Buy Sell Agreement
 42-2 Cross Purchase Buy Sell Agreement
 42-3 Stock Redemption Buy Sell Agreement

CH. 43 -- MARITAL PROPERTY AGREEMENTS

- 43-1 Postmarital Property Agreement - cash and specified assets
 43-1(a) Voluntary Waiver of Further Disclosure (for use with Form 43-1)
 43-2 Agreement to Transmute Separate Property to Community Property

CH. 50 -- PRELIMINARY INFORMATION FORMS

- 50-1 Preliminary Information (for Husband & Wife)
 50-2 Preliminary Information (for Indiv)
 50-3 Preliminary Information (for Domestic Partners)

CH. 51 -- FACT FINDERS

- 51-1 Attorney Fact Finder (for Husband & Wife)
 51-2 Attorney Fact Finder (for Indiv)
 51-3 Attorney Fact Finder (for Domestic Partners)

CH. 52 -- FEE AGREEMENTS

- 52-1 Fee Agreement (for Married client)
 52-2 Fee Agreement (for Indiv client)
 52-3 Fee Agreement (for one Domestic Partner)
 52-4 Fee Agreement (for two Domestic Partners)

CH. 53 -- LETTERS

- 53-1 Letter Sent with Drafts (for Husband & Wife)
 53-2 Letter for Signed Original Documents (for Husband & Wife)
 53-3 Letter Sent with Drafts (for Indiv)
 53-4 Letter for Signed Original Documents (for Indiv)
 53-5 Letter Sent with Drafts (for Domestic Partners)
 53-6 Letter for Signed Original Documents (for Domestic Partners)
 53-7 Written Notice to Depositor (Husband)
 53-8 Written Notice to Depositor (Wife)
 53-9 Written Notice to Depositor (Indiv)
 53-10 Written Notice to Depositor (DP #1)
 53-11 Written Notice to Depositor (DP #2)

CH. 54 -- WILL & CODICIL SIGNING CEREMONY

- 54-1 Will & Codicil Signing Ceremony (for Husband & Wife)
 54-2 Will & Codicil Signing Ceremony (for Indiv)
 54-3 Will & Codicil Signing Ceremony (for DP #1)
 54-4 Will & Codicil Signing Ceremony (for DP #2)