

This volume provides a complete small estate package for a general practitioner providing legal services to a husband, wife, individual, or domestic partner. Whether you draft wills as a normal part of your practice or you offer them as a value-added service for clients, you will find this volume extraordinarily useful. It contains more than 80 automated forms you need to represent clients with uncomplicated estates—generally those not subject to the federal estate tax.

1-1 Case Profile

HUSBAND'S ESTATE PLANNING DOCUMENTS

- 1-01 Simple Will
- 1-02 Trust Will
- 1-03 Pour-over Will
- 1-04 Durable Power of Attorney
- 1-05 Modification of Power of Attorney
- 1-06 Revocation of Power of Attorney
- 1-07 Physician's Declaration
- 1-08 Advance Health Care Directive
- 1-09 HIPAA Release
- 1-10 Revocation of Advance Health Care Directive
- 1-11 Uniform Donor Card
- 1-12 Separate Writing for Tangible Personal Property
- 1-13 Revocable Trust Declaration-Agreement
- 1-14 Codicil
- 1-15 Written Revocation of Will

WIFE'S ESTATE PLANNING DOCUMENTS

- 2-01 Simple Will
- 2-02 Trust Will
- 2-03 Pour-over Will
- 2-04 Durable Power of Attorney
- 2-05 Modification of Power of Attorney
- 2-06 Revocation of Power of Attorney
- 2-07 Physician's Declaration
- 2-08 Advance Health Care Directive
- 2-09 HIPAA Release
- 2-10 Revocation of Advance Health Care Directive
- 2-11 Uniform Donor Card
- 2-12 Separate Writing for Tangible Personal Property
- 2-13 Revocable Trust Declaration-Agreement
- 2-14 Codicil
- 2-15 Written Revocation of Will

INDIVIDUAL'S ESTATE PLANNING DOCUMENTS

- 3-01 Simple Will
- 3-02 Trust Will
- 3-03 Pour-over Will
- 3-04 Durable Power of Attorney
- 3-05 Modification of Power of Attorney
- 3-06 Revocation of Power of Attorney
- 3-07 Physician's Declaration
- 3-08 Advance Health Care Directive
- 3-09 HIPAA Release
- 3-10 Revocation of Advance Health Care Directive
- 3-11 Uniform Donor Card
- 3-12 Separate Writing for Tangible Personal Property
- 3-13 Revocable Trust Declaration-Agreement
- 3-14 Codicil
- 3-15 Written Revocation of Will

DOMESTIC PARTNERSHIPS

CREATING/TERMINATING A DOMESTIC PARTNERSHIP

- 4-01 Declaration of Domestic Partnership
- 4-02 Notice of Termination of Domestic Partnership
- 4-03 Revocation of Termination of Domestic Partnership
- 4-04 Pre-partnership Property Agreement

ESTATE PLANNING DOCUMENTS OF DOMESTIC PARTNER A

- 5-01 Simple Will
- 5-02 Trust Will
- 5-03 Pour-over Will
- 5-04 Durable Power of Attorney
- 5-05 Modification of Power of Attorney
- 5-06 Revocation of Power of Attorney
- 5-07 Physician's Declaration
- 5-08 Advance Health Care Directive
- 5-09 HIPAA Release
- 5-10 Revocation of Advance Health Care Directive
- 5-11 Uniform Donor Card
- 5-12 Separate Writing for Tangible Personal Property
- 5-13 Revocable Trust Declaration-Agreement
- 5-14 Codicil
- 5-15 Written Revocation of Will

ESTATE PLANNING DOCUMENTS OF DOMESTIC PARTNER B

- 6-01 Simple Will
- 6-02 Trust Will
- 6-03 Pour-over Will
- 6-04 Durable Power of Attorney
- 6-05 Modification of Power of Attorney
- 6-06 Revocation of Power of Attorney
- 6-07 Physician's Declaration
- 6-08 Advance Health Care Directive
- 6-09 HIPAA Release
- 6-10 Revocation of Advance Health Care Directive
- 6-11 Uniform Donor Card
- 6-12 Separate Writing for Tangible Personal Property
- 6-13 Revocable Trust Declaration-Agreement
- 6-14 Codicil
- 6-15 Written Revocation of Will

MINOR CHILDREN'S DOCUMENTS

- 7-01 Medical Power of Attorney (Minor Dependent Child)
- 7-02 HIPAA Release (Minor Dependent Child)
- 7-03 Revocation of Medical Power of Attorney (Minor Dependent Child)

MISCELLANEOUS DOCUMENTS

- 8-01 Consent to Concurrent Representation
- 8-02 Client Questionnaire (Long Form)
- 8-03 Client Questionnaire (Short Form)

LOCAL FORMS

KERN COUNTY

- 114-100 Power of Attorney - General
- 114-105 Power of Attorney - Limited

LOS ANGELES COUNTY

- 118-101 Notice of Deposit of Estate Planning Docs and Acknowledgment

RIVERSIDE COUNTY

- 132-100 Power of Attorney - General
- 132-105 Power of Attorney - Revocation
- 132-110 Receipt for Will

SAN BERNARDINO COUNTY

- 135-100 Power of Attorney - General

SAN DIEGO COUNTY

- 136-100 Notice Of Transfer Of Estate Planning Documents

SAN JOAQUIN COUNTY

- 138-100 Notice of Transfer of Estate Planning Documents to Clerk