

The more than 400 automated forms in this volume are designed to be the cornerstone of an estate planning practice. Lipman's Wills & Trusts is sophisticated enough for any high-end estate planning project, yet simple and flexible enough to handle smaller estates as well. The forms in this volume cover all aspects of estate planning, including the preparation of wills, living trusts, powers of attorney, health care proxies, HIPAA releases, living wills, irrevocable trusts, buy-sell agreements, and even pre-marital & post-marital property agreements.

## **CH. 1 -- HUSBAND'S WILLS**

- 1-1 Simple - short version
- 1-2 Simple - long version
- 1-3 Pourover - short version
- 1-4 Pourover - long version
- 1-5 Bypass Trust only - no marital trust
- 1-6 Bypass &/or QTIP
- 1-7 Bypass &/or QTIP with separate share trusts
- 1-8 Bypass & QTIP with GST exempt trusts
- 1-9 Bypass & QTIP with GST exempt & nonexempt trusts

## **CH. 2 -- WIFE'S WILLS**

- 2-1 Simple - short version
- 2-2 Simple - long version
- 2-3 Pourover - short version
- 2-4 Pourover - long version
- 2-5 Bypass Trust only - no marital trust
- 2-6 Bypass &/or QTIP
- 2-7 Bypass &/or QTIP with separate share trusts
- 2-8 Bypass & QTIP with GST exempt trusts
- 2-9 Bypass & QTIP with GST exempt & nonexempt trusts

## **CH. 3 -- INDIVIDUAL'S WILLS**

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

## **CH. 4 -- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1 WILLS**

- 4-1 Simple
- 4-2 Pourover - short version
- 4-3 Pourover - long version
- 4-4 Trust for Partner, then separate share trusts
- 4-5 Separate Share Trusts for one or more beneficiaries

## **CH. 5 -- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2 WILLS**

- 5-1 Simple
- 5-2 Pourover - short version
- 5-3 Pourover - long version
- 5-4 Trust for Partner, then separate share trusts
- 5-5 Separate Share Trusts for one or more beneficiaries

## **CH. 6 -- HUSBAND'S MISCELLANEOUS DOCUMENTS**

- 6-1(old) Power of Attorney - OLD FORM
- 6-1(new) Power of Attorney - NEW FORM
- 6-1(a) Notice to Person Executing Power of Attorney
- 6-1(b) Affidavit of Agent
- 6-1(c) Affidavit of Physician (that Husband lacks capacity)
- 6-1(d) New York General Obligations Law Provisions
- 6-2 Health Care Proxy
- 6-3 HIPAA Release
- 6-4 Living Will

- 6-5 Codicil
- 6-6 Organ Donor Card
- 6-7 Revocation of Power of Attorney
- 6-8 Video Will Checklist
- 6-9 Nomination of Guardian
- 6-10 Declaration For Mental Health Treatment
- 6-11 Designation of Person in Parental Relation
- 6-12 Nomination of Guardian for Children
- 6-13 Memorandum Regarding Personal Belongings
- 6-14 Form to Donate Body for Medical Study
- 6-15 Appointment of Agent to Dispose of Remains
- 6-16 Disclosure Regarding Commissions
- 6-17 Putnam Affidavit
- 6-18 General Waiver of Election to Take Against Will
- 6-19 Limited Waiver of Election to Take Against Will

## **CH. 7 -- WIFE'S MISCELLANEOUS DOCUMENTS**

- 7-1(old) Power of Attorney - OLD FORM
- 7-1(new) Power of Attorney - NEW FORM
- 7-1(a) Notice to Person Executing Power of Attorney
- 7-1(b) Affidavit of Agent
- 7-1(c) Affidavit of Physician (that Wife lacks capacity)
- 7-1(d) New York General Obligations Law Provisions
- 7-2 Health Care Proxy
- 7-3 HIPAA Release
- 7-4 Living Will
- 7-5 Codicil
- 7-6 Organ Donor Card
- 7-7 Revocation of Power of Attorney
- 7-8 Video Will Checklist
- 7-9 Nomination of Guardian
- 7-10 Declaration For Mental Health Treatment
- 7-11 Designation of Person in Parental Relation
- 7-12 Nomination of Guardian for Children
- 7-13 Memorandum Regarding Personal Belongings
- 7-14 Form to Donate Body for Medical Study
- 7-15 Appointment of Agent to Dispose of Remains
- 7-16 Disclosure Regarding Commissions
- 7-17 Putnam Affidavit
- 7-18 General Waiver of Election to Take Against Will
- 7-19 Limited Waiver of Election to Take Against Will

## **CH. 8 -- INDIVIDUAL'S MISCELLANEOUS DOCUMENTS**

- 8-1(old) Power of Attorney - OLD FORM
- 8-1(new) Power of Attorney - NEW FORM
- 8-1(a) Notice to Person Executing Power of Attorney
- 8-1(b) Affidavit of Agent
- 8-1(c) Affidavit of Physician (that Individual lacks capacity)
- 8-1(d) New York General Obligations Law Provisions
- 8-2 Health Care Proxy
- 8-3 HIPAA Release
- 8-4 Living Will
- 8-5 Codicil
- 8-6 Organ Donor Card

- 8-7 Revocation of Power of Attorney
- 8-8 Video Will Checklist
- 8-9 Nomination of Guardian
- 8-10 Declaration For Mental Health Treatment
- 8-11 Designation of Person in Parental Relation
- 8-12 Nomination of Guardian for Children
- 8-13 Memorandum Regarding Personal Belongings
- 8-14 Form to Donate Body for Medical Study
- 8-15 Appointment of Agent to Dispose of Remains
- 8-16 Disclosure Regarding Commissions
- 8-17 Putnam Affidavit

#### **CH. 9 -- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1 MISC DOCUMENTS**

- 9-1(old) Power of Attorney - OLD FORM
- 9-1(new) Power of Attorney - NEW FORM
- 9-1(a) Notice to Person Executing Power of Attorney
- 9-1(b) Affidavit of Agent
- 9-1(c) Affidavit of Physician (that Same-sex Spouse #1/DP #1 lacks capacity)
- 9-1(d) New York General Obligations Law Provisions
- 9-2 Health Care Proxy
- 9-3 HIPAA Release
- 9-4 Living Will
- 9-5 Codicil
- 9-6 Organ Donor Card
- 9-7 Revocation of Power of Attorney
- 9-8 Video Will Checklist
- 9-9 Nomination of Guardian
- 9-10 Declaration For Mental Health Treatment
- 9-11 Designation of Person in Parental Relation
- 9-12 Nomination of Guardian for Children
- 9-13 Memorandum Regarding Personal Belongings
- 9-14 Form to Donate Body for Medical Study
- 9-15 Appointment of Agent to Dispose of Remains
- 9-16 Disclosure Regarding Commissions
- 9-17 Putnam Affidavit

#### **CH. 10 -- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2 MISC DOCUMENTS**

- 10-1(old) Power of Attorney - OLD FORM
- 10-1(new) Power of Attorney - NEW FORM
- 10-1(a) Notice to Person Executing Power of Attorney
- 10-1(b) Affidavit of Agent
- 10-1(c) Affidavit of Physician (that Same-sex Spouse #2/DP #2 lacks capacity)
- 10-1(d) New York General Obligations Law Provisions
- 10-2 Health Care Proxy
- 10-3 HIPAA Release
- 10-4 Living Will
- 10-5 Codicil
- 10-6 Organ Donor Card
- 10-7 Revocation of Power of Attorney
- 10-8 Video Will Checklist
- 10-9 Nomination of Guardian
- 10-10 Declaration For Mental Health Treatment
- 10-11 Designation of Person in Parental Relation
- 10-12 Nomination of Guardian for Children
- 10-13 Memorandum Regarding Personal Belongings
- 10-14 Form to Donate Body for Medical Study
- 10-15 Appointment of Agent to Dispose of Remains
- 10-16 Disclosure Regarding Commissions
- 10-17 Putnam Affidavit

#### **CH. 11 -- HUSBAND & WIFE'S REVOCABLE LIVING TRUSTS**

- 11-1 Blind Trust
- 11-2 Simple - outright to beneficiaries
- 11-3 Simple - with separate share trusts
- 11-4 Bypass &/or QTIP
- 11-5 Bypass &/or QTIP with separate share trusts
- 11-6 Bypass & QTIP with GST exempt trusts
- 11-7 Bypass & QTIP with GST exempt & nonexempt trusts

#### **CH. 12 -- HUSBAND'S REVOCABLE LIVING TRUSTS**

- 12-1 Simple - outright to beneficiaries
- 12-2 Simple - with separate share trusts
- 12-3 Bypass &/or QTIP
- 12-4 Bypass &/or QTIP with separate share trusts
- 12-5 Bypass & QTIP with GST exempt trusts
- 12-6 Bypass & QTIP with GST exempt & nonexempt trusts

#### **CH. 13 -- WIFE'S REVOCABLE LIVING TRUSTS**

- 13-1 Simple - outright to beneficiaries
- 13-2 Simple - with separate share trusts
- 13-3 Bypass &/or QTIP
- 13-4 Bypass &/or QTIP with separate share trusts
- 13-5 Bypass & QTIP with GST exempt trusts
- 13-6 Bypass & QTIP with GST exempt & nonexempt trusts

#### **CH. 14 -- INDIVIDUAL'S REVOCABLE LIVING TRUSTS**

- 14-1 Blind Trust
- 14-2 Simple - outright to beneficiaries
- 14-3 Family - Sprinkle Trust
- 14-4 Separate Share Trusts

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

- 15-1 Simple - outright to beneficiaries
- 15-2 Trust for partner, then separate share trusts
- 15-3 Separate Share Trusts for one or more beneficiaries

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

- 16-1 Simple - outright to beneficiaries
- 16-2 Trust for partner, then separate share trusts
- 16-3 Separate Share Trusts for one or more beneficiaries

#### **CH. 17 -- HUSBAND & WIFE'S MISCELLANEOUS REVOCABLE TRUST FORMS**

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

#### **CH. 18 -- HUSBAND'S MISCELLANEOUS REVOCABLE TRUST FORMS**

- 18-1 Memorandum Regarding Funding of Revocable Trust
- 18-2 Deed Transferring Property to Revocable Trust
- 18-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 18-4 Certification of Trust (for Husband's Revocable Trust)
- 18-5 Memorandum Regarding Transfer of Accounts
- 18-6 Bill of Sale
- 18-7 Amendment to Revocable Trust

#### **CH. 19 -- WIFE'S MISCELLANEOUS REVOCABLE TRUST FORMS**

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

#### **CH. 20 -- INDIVIDUAL'S MISCELLANEOUS REVOCABLE TRUST FORMS**

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

#### **CH. 21 --- SAME-SEX SPOUSE #1/DOMESTIC PARTNER #1'S MISC REV TRUST FORMS**

- 21-1 Memorandum Regarding Funding of Revocable Trust
- 21-2 Deed Transferring Property to Revocable Trust

- 21-3 Letter to Lender Re. Transfer of Account to Revocable Trust
- 21-4 Certification of Trust (for Same-sex Spouse #1/DP #1's Revocable Trust)
- 21-5 Memorandum Regarding Transfer of Accounts
- 21-6 Bill of Sale
- 21-7 Amendment to Revocable Trust

**CH. 22 --- SAME-SEX SPOUSE #2/DOMESTIC PARTNER #2'S MISC REV TRUST FORMS**

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

**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 (Individual 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 (Individual 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 (Individual 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 (Individual 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 BENE LIFE INS TRUST - Insurance on Husband (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)
- 26-3 HUSBAND PRIMARY BENE LIFE INS TRUST - Insurance 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)
- 26-4 LIFE INS TRUSTS FOR CHILDREN - Insurance on Husband (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 - Insurance 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 (Individual 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 - Insurance on Individual (Individual 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 (Individual 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 (Individual 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 (Individual 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 (Individual 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 (Individual 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 (Individual 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 PREMARITAL AGREEMENT
- 43-1(a) Premarital Agreement Attorney Checklist (for use with Form 43-1)
- 43-1(b) Reaffirmation of Premarital Agreement (for use with Form 43-1)
- 43-2 POSTMARITAL PROPERTY AGREEMENT
- 43-2(a) Postmarital Property Agreement Attorney Checklist (for use with Form 43-2)

**CH. 50 -- PRELIMINARY INFORMATION FORMS**

- 50-1 Preliminary Information (for Husband & Wife)
- 50-2 Preliminary Information (for Individual)
- 50-3 Preliminary Information (for Same-sex Spouses/Domestic Partners)

**CH. 51 -- FACT FINDERS**

- 51-1 Attorney Fact Finder (for Husband & Wife)
- 51-2 Attorney Fact Finder (for Individual)
- 51-3 Attorney Fact Finder (for Same-sex Spouses/Domestic Partners)

**CH. 52 -- FEE AGREEMENTS**

- 52-1 Fee Agreement (for Married client)
- 52-2 Fee Agreement (for Individual client)
- 52-3 Fee Agreement (for one Same-sex Spouse/Domestic Partner)
- 52-4 Fee Agreement (for two Same-sex Spouses/Domestic Partners)

**CH. 53 -- LETTERS**

- 53-1 Letter Sent with Drafts
- 53-2 Letter Sent with Signed Originals
- 53-3 Letter re. Deposit of Signed Documents (Husband)
- 53-4 Letter re. Deposit of Signed Documents (Wife)
- 53-5 Letter re. Deposit of Signed Documents (Individual)
- 53-6 Letter re. Deposit of Signed Documents (Same-sex Spouse #1/DP #1)
- 53-7 Letter re. Deposit of Signed Documents (Same-sex Spouse #2/DP #2)

**CH. 54 -- WILL & CODICIL SIGNING CEREMONY**

- 54-1 Will & Codicil Signing Ceremony (for Husband & Wife)
- 54-2 Will & Codicil Signing Ceremony (for Individual)
- 54-3 Will & Codicil Signing Ceremony (for Same-sex Spouse #1/DP #1)
- 54-4 Will & Codicil Signing Ceremony (for Same-sex Spouse #2/DP #2)