

CORE EDITION

Will System

Wills with and without tax planning
 Wills with testamentary trusts
 Will Summary
 Ancillary documents including:
Durable Financial Power of Attorney
Health Care Power of Attorney
Living Will
HIPAA Authorization
Anatomical gift form
Personal Property Memorandum
Name and Fiduciary Summary
Client Portfolio Inserts

Living Trust System

Individual and Joint Revocable Trusts
 Comprehensive Intake Questionnaire
 Estate tax planning including marital deduction planning
Including planning with Clayton Election and generation-skipping transfer tax (GSTT)
Continuing and testamentary trusts for beneficiaries
 Comprehensive charitable planning
Testamentary charitable trusts and private foundations
 Trust protector provisions
 Conduit trust provisions for retirement accounts
 Trust Summaries
 Ancillary documents including:
Trust funding instructions
Pour-over Wills
Durable Financial Power of Attorney
Health Care Power of Attorney
Living Will
HIPAA Authorization
Anatomical gift form
Remembrance and Services Memorandum
Personal Property Memorandum
Certification of Trust and Affidavit of Trust
Name and Fiduciary Summary
Client portfolio inserts
Community and separate property agreements
And more!

Client Letter Suite

Spousal conflict waiver letter
 Initial client letters
 Intake worksheets/comprehensive interview questionnaires
 Client engagement/disengagement letters
 Invoices

Trust Protector Supporting Documents

Approval/Rejection of Accounting
 Exercise of powers documents
 Trust Protector replacement/removal/resignation documents
 Appointment of Successor Trust Protector
 Removal and replacement of Trustee

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Your Practice Gets

- A streamlined and efficient drafting process
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- Documents that are accurate, easy to understand and written “in plain English”
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COMPLETE EDITION *includes all Core document systems*

Irrevocable Trust System

Individual and Joint Irrevocable Trusts
Trust Protector Provisions
Ability to draft Spousal Lifetime Access Trust (SLAT)

Irrevocable Life Insurance Trusts (ILIT)

Domestic Asset Protection Trust (DAPT)
(Alaska, Delaware, Nevada, South Dakota)
DAPT Solvency Affidavit

Third-Party DAPT (aka Hybrid Domestic Asset Protection Trust)

Gifting Trust

Health and Education Exclusion Trust (HEET)

Inheritor's Trust (BETIR, BDIT, BDGT)

Intentionally Defective Grantor Trust (IDGT)
IDGT Gift and Sale documents including:
Assignment of Property
Promissory Note
Self-Canceling Installment Note (SCIN)
Security Agreement
Guarantee Agreement
Physician Statement

2503(c) Minor's Trust

Ancillary documents including:
Certificate of Trust
Demand right notification
Trustee resignation, removal, and replacement
Promissory note
Client letters and enclosures
And more

Charitable Planning System

Charitable remainder trusts (CRAT, CRUT, NICRUT, NIMCRUT, FLIP-CRUT)

Charitable lead trusts (CLAT, CLUT)

Private foundations – corporate and trust

Ancillary documents including:
Gift agreements
Gift annuity agreements
Life estate reserved deeds
Maintenance and ownership agreements
Certificate of Trust
And more

Retirement Planning System

Stand-Alone Retirement Trusts (Conduit, Accumulation, and toggle trusts)

Retirement plan beneficiary designations (Including IRA beneficiary designation forms and qualified plan beneficiary designation forms)

Ancillary documents including:
Certificate of Trust
Funding instructions and forms
Operating guidelines
Client letters – Inherited IRA
IRA Notice to Administrator
Trustee resignation, removal, and replacement forms
And more

Qualified Terminable Interest Property (QTIP) Trust System

Lifetime QTIP trust

Ancillary documents including:
QTIP Certificate of Trust
Trustee resignation, removal, and replacement forms
And more

Qualified Personal Residence Trust (QPRT) System

Qualified Personal Residence Trusts (QPRT)

Ancillary documents including:
Certificate of Trust
Trustee resignation, removal, and replacement forms
And more

Grantor Retained Trust (GRT) System

Grantor Retained Trust (GRAT, GRUT, GRIT)

Ancillary documents including:
Certificate of Trust
Trustee resignation, removal and replacement
And more

Family Limited Partnership System

Entity formation documents including:
FLP Partnership agreements
FLP Management Trusts
FLP funding and transfer documents including:
FLP Certificates
FLP Transfer Ledger
Limited Partnership Subscription Agreement
Contribution schedules
Affidavits of Contribution

FLP gift and sale documents including
Private annuities
Self-canceling installment note (SCIN)
Security Agreement
Guarantee Agreement
Assignments
Correspondence templates and design checklists

Ancillary documents including:
FLP Operations Manual
Client letters
And more

Supplemental Needs Trust System

Individual and Joint Supplemental Needs Trusts

Ancillary documents including:
Memorandum of Intent
Certificate of Trust
Trustee Resignation, Removal, and Replacement
And more

Limited Liability Company System

Entity formation documents including:
LLC Operations Manual
Consent of Registered Agent

LLC Operating Agreement

Funding and transfer documents including:
Membership Interest Certificates
Transfer Ledger
Subscription Agreement

Ancillary documents including:
Solvency certificate
Consent to Action in Place of Organizational Meetings
Correspondence
And more

Business Succession Planning System

Buy-Sell Agreements

Employee Purchase/Bonus Agreement

Stay bonus

Deferred Compensation Agreement

Section 83(b) Election

Top Hat IRS Letter

And more

Physician's System

Domestic Asset Protection Trust (Alaska, Delaware, Nevada, and South Dakota)

Administrative Services Agreement

Practice Buy-in Agreement

Equipment Lease

Physician Employment Agreement

Premise Lease Agreement

Transmutation Agreement - Waiver