



# Wills

## Table of Contents

	<b>Administrative Forms</b>
1.1	Disclosure and Consent to Joint Representation
1.2	Estate Planning Worksheet
1.3	Wills Intake
1.4	Engagement Letter
1.5	Flat Fee Agreement
	<b>Wills</b>
2.1	Simple Will
	Simple Will-Spouse
2.2	Simple Will – Dynasty Trust for Primary Beneficiaries
	Simple Will – Dynasty Trust for Primary Beneficiaries – Spouse
2.3	Tax Oriented Will
	Tax Oriented Will – Spouse
2.5	Pourover Will-Married Primary Testator
	Pourover Will-Spouse
2.6	Pourover Will – Single Person
2.7	Small Estate Will With Special Needs Trust
	Small Estate Will With Special Needs Trust-Spouse
2.10	Basic Will-Married Testator (Simplified Distribution Language)
2.11	Basic Will –Spouse (Simplified Distribution Language)
2.12	Basic Will-Single Person (Simplified Distribution Language)
2.13	Basic Pourover Will-Married Testator
2.14	Basic Pourover Will – Spouse
2.15	Basic Pourover Will-Single Person
2.20	Codicil to Will
2.21	Will Cover Page
	Will Cover Page - Spouse
	<b>Estate Planning Exit Letters to Client</b>
3.1	Exit Letter – Simple Wills
3.3	Exit Letter – Tax Oriented Wills
3.5	Will Signing Ceremony
	<b>Estate Planning Forms</b>
4.1	Statutory Durable Power of Attorney
	Spouse’s Statutory Durable Power of Attorney
4.2	Durable Power of Attorney (Not Statutory)
	Spouse’s Durable Power of Attorney (Not Statutory)
4.3	Certification of Durable Power of Attorney by Agent
	Spouse’s Certification of Durable Power of Attorney by Agent
4.5	Medical Power of Attorney and Designation of Health Care Agent
	Spouse’s Medical Power of Attorney and Designation of Health Care
4.6	Directive to Physician and Family or Surrogates
	Spouse’s Directive to Physician and Family or Surrogates

4.7	Statutory Declaration of Guardian
	Spouse's Statutory Declaration of Guardian
4.8	Statutory Declaration for Mental Health Treatment
	Spouse's Statutory Declaration for Mental Health Treatment
4.9	Declaration Regarding Anatomical Gifts
	Spouse's Declaration Anatomical Gifts
4.10	Appointment for Disposition of Remains
	Spouse's Appointment for Disposition of Remains
4.11	HIPAA Release and Authorization
	Spouse's HIPAA Release and Authorization
4.12	HIPAA Release and Authorization (PDF)
	Spouse's HIPAA Release and Authorization (PDF)
4.13	Revocation of Power of Attorney
4.14	Mutual Consent Agreement
4.15	Supported Decision Making Agreement
4.16	Out of Hospital DNR (TX Dept of State Health Svcs)
	Spouse's Out of Hospital DNR (TX Dept of State Health Svcs)
4.17	Final Wishes
	Spouse's Final Wishes
4.18	Limited Power of Attorney
4.19	Beneficiary Designation for a Motor Vehicle (VTR-121)
4.20	Notary Log for Contemporaneous Estate Planning Document Execution
	Spouse's Notary Log for Contemporaneous Estate Planning Document Execution
	<b>Survivorship Agreement and Transfers on Death</b>
5.1	Transfer on Death Deed-One Person
5.2	Transfer on Death Deed-Spouses
5.3	Revocation of Transfer on Death Deed
5.4	Survivorship Agreement
5.5	Survivorship Agreement for Community Property
	<b>Trust Documents (see Trusts volume for specialized trusts)</b>
6.1	Living Trust – Spouses
6.2	Living Trust-Single Person
6.3	Certification of Trust
6.4	Special Warranty Deed-Single Person to Trust
6.5	Special Warranty Deed – Spouses to Trust
6.8	Qualified Income Trust
6.9	Letter to Trustee of Qualified Income Trust
6.10	Gun Trust
6.15	Amendment to Trust
	<b>Minor Children</b>
7.1	Medical Power of Attorney and Designation of Health Care Agent-For a Minor
7.2	Medical Power of Attorney for a Minor – Disclosure Statement
7.3	Statutory Declaration of Appointment of Guardian for Minor Child
7.4	HIPAA Authorization and Release for a Minor
	<b>Miscellaneous</b>

8.1	Unsworn Declaration
8.2	Unsworn Declaration Jurat
8.3	Self-Proving Affidavit
8.4	Self-Proving Affidavit for Holographic Will
8.5	Affidavit Shell
	<b>Medicaid</b>
9.1	Application for Benefits