

	Norris Modern Wills Table of Contents
	0. Intakes
0.01	Modern Client Intake
	Printable Blank Modern Client Intake
	1. Client Forms
	Client Agreements
1.01	Flat Fee Agreement
1.02	Mutual Representation Consent Agreement
	Planning and Client Communication
1.05	Confirmation of Client Information
	Confirmation of Spouse Information
1.06	Client Letter - Shell
1.07	Answers to Frequently Asked Estate Planning Questions
1.08	Client Letter - Drafts of Estate Planning Documents
1.09	Funding Instructions
1.10	Letter Regarding Transfer of Accounts RLT
1.11	Letter to Trustee of Qualified Income Trust
1.12	Letter of Instruction to Executor
1.13	Notice of Disclaimer
1.14	Closing Letter
	2. Wills
2.01	Modern Will Cover Page
	Spouse's Modern Will Cover Page
2.02	Modern Will
	Spouse's Modern Will
2.05	Will Signing Ceremony
2.08	Codicil to Modern Will
	Spouse's Codicil to Modern Will
2.10	(Discontinued) Basic Will for Married Testator
2.11	(Discontinued) Basic Will - Spouse
2.12	(Discontinued) Basic Will – Single Person
	4. Estate Planning Forms
4.01	Statutory Durable Power of Attorney
	Spouse's Statutory Durable Power of Attorney
	Important Information for Agent
4.02	Durable Power of Attorney (Not Statutory)
	Spouse's Durable Power of Attorney (Not Statutory)
	Important Information for Agent
4.03	Certification of Durable Power of Attorney by Agent
	Spouse's Certification of Durable Power of Attorney by Agent
4.05	Medical Power of Attorney and Designation of Health Care Agent
	Spouse's Medical Power of Attorney and Designation of Health Care Agent

4.06	Directive to Physician and Family or Surrogates
	Spouse's Directive to Physician and Family or Surrogates
4.07	Statutory Declaration of Guardian
	Spouse's Statutory Declaration of Guardian
4.08	Statutory Declaration for Mental Health Treatment
	Spouse's Statutory Declaration for Mental Health Treatment
4.09	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
4.15	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
	5. Survivorship Agreement and Transfers on Death
5.01	Transfer on Death Deed-One Person
5.02	Transfer on Death Deed-Spouses – Client Separate
	Spouse's Transfer on Death Deed
5.03	Transfer on Death Deed - Spouses Joint
5.04	Revocation of Transfer on Death Deed
5.06	Survivorship Agreement
5.07	Survivorship Agreement for Community Property
5.10	Community Interest Special Warranty Deed
	6. Trust Documents (see Trusts volume for specialized trusts)
6.01	Living Trust – Spouses
	Memorandum of Personal Property - Married Client
	Memorandum of Personal Property for Spouse
6.02	Living Trust-Single Person
	Memorandum of Personal Property - Single Person
6.03	Assignment of Property to Trust
6.04	Certification of Trust
6.05	Special Warranty Deed – Single Person to Trust
6.06	Special Warranty Deed – Spouses to Trust
6.08	Qualified Income Trust
6.10	Gun Trust
6.15	Amendment to Trust

	7. Minor Children
7.01	Medical Power of Attorney and Designation of Health Care Agent - For a Minor
7.03	Combined Statutory Declaration of Appointment of Guardian for Minor Child
7.04	Client's Statutory Declaration of Appointment of Guardian for Minor Child
	Spouse's Statutory Declaration of Appointment of Guardian for Minor Child
7.05	HIPAA Release and Authorization for a Minor
	8. Miscellaneous
8.01	Unsworn Declaration
8.02	Jurat (Notarized or Unsworn)
8.03	Self-Proving Affidavit
8.04	Self-Proving Affidavit for Holographic Will
8.05	Affidavit Shell
8.06	Jurat for Testator Unable to Sign
8.07	Affidavit or Declaration Regarding Translation of Document
	9. Medicaid
9.01	Application for Benefits