

ESTATE PLANNING

This category contains wills, codicils, living trusts, agreements for advancements and other estate planning items.

WILLS

This category contains wills and revocation of wills.

Personal inventory worksheet for estate planning

This choice prepares a blank form which is then filled in to provide a complete inventory of a person's assets. This should be done prior to the execution of a will and periodically thereafter, and should be left for easy access by the person's family and executor.

Caveat (demand for notice if estate is filed)

This is a form used to file with the clerk of the court or other official when a person wants notice if an estate is filed for a particular individual.

Joint and mutual will

This is a joint will executed by husband and wife. Normally not used but provided if there is an overriding legal reason for such a will to be used.

Nuncupative will (oral will later reduced to writing)

Under certain state and federal laws, soldiers or sailors may if they are in fear of death make a verbal will, usually limited to a small amount in value or their belongings. The witnesses then must reduce the will to writing. This form is provided for that purpose.

Simple will-- All to spouse

This will provides for the entire estate of a person to be given to their spouse.

Simple will-- All to children in equal shares

This will provides for the person's entire estate to be given to their children in equal shares.

Simple will-- All to stated individuals in equal shares

This will provides that the estate be divided into equal parts and that the named beneficiaries share in the estate equally.

Will providing trust for education of children/grand children

This will includes a clause to establish a trust to provide for children/grand children or other relatives to receive assistance towards their educations.

Will- 2 beneficiaries- unequal shares

Prepares a will with two beneficiaries, the shares of the estate to vary. May be set in any range.

Will- 3 beneficiaries- unequal shares

Prepares a will with three beneficiaries, the shares can be set for any percentages.

Will- 4 beneficiaries- unequal shares

Prepares a will with three beneficiaries, the shares can be set for any percentages.

Will- 5 beneficiaries- unequal shares

Prepares a will with five beneficiaries, the shares can be set for any percentages.

Will- 6 beneficiaries- unequal shares

Prepares a will with six beneficiaries, the shares can be set for any percentages.

Will- 7 beneficiaries- unequal shares

Prepares a will with seven beneficiaries, the shares can be set for any percentages.

Revocation of all previous wills

This form may be used to revoke all wills that a person has previously made. Unless another will is made, the person is then intestate (without a will.)

Advancement agreement

This is an agreement which recognizes that a beneficiary under a will has received an advance towards their inheritance, and that the heir will have the value of the advance deducted from what they would otherwise received. Also makes clear that the testator can change their will to disinherit the heir despite the advance.

Will-- deducting of advancements

Will directing the executor to deduct advancements made to specified heirs.

Simple will-- All to charity

This will provides that the estate be donated to a charity.

CODICILS

This category contains codicils (amendment to wills).

Codicil- Revocation of gift

This form prepares a codicil (amendment to a will). This codicil is used to cancel a gift made in a will.

Codicil- New Bequests

This form prepares a codicil (amendment to a will). This form is used to make a new series of gifts.

Codicil- New Executor

This form prepares a codicil (amendment to a will). This form is used to change the executor (personal representative) in a will.

Codicil- Purchase gift

This form prepares a codicil (amendment to a will). If a person desires to make a gift in their will allowing a person to buy a piece of property for below its value, this form can be used to add this provision into the will.

Codicil- Forgive debts

This form prepares a codicil (amendment to a will). If a person desires to forgive a debt in a will, this codicil can be used to forgive the debt.

Codicil- New child

This form prepares a codicil (amendment to a will). If a person has a child born after the will was created, this codicil can be used to

provide for the new child.

Codicil- New spouse

This form prepares a codicil (amendment to a will). If a person marries after preparing a will, this codicil can be used to provide for the new spouse.

Codicil- Life estate gift

This form prepares a codicil (amendment to a will). This form is used to make a life estate gift that is not in the original will.

Codicil; Revival of previously revoked will

This form prepares a codicil (amendment to a will). This codicil restores (revives) a previously cancelled will. Although there are good reasons for the use of this form it is not generally desirable. It is better to do a new will rather than revive an old one.

LIVING TRUSTS

This category contains living trusts, revocation of living trusts, and forms related to the living trust.

Living Trust basic form

This form creates a revocable living trust. A living trust is a testamentary device, used instead of a will.

Pour over will

Should be executed together with a living trust. Provides that any property which you did not deed to your living trust pass to your living trust at your death.

Revocation of living trust basic form

This form can be used to revoke any living trust in which the person who made the trust reserved a right of revocation.

REAL ESTATE

Within this category are various contracts for sale and purchase of real estate.

PURCHASE AND SALE

This category covers the purchases and sale of real estate.

Offer to purchase real estate

Offer, which once signed, creates a binding agreement to sell real estate.

Option to purchase real estate

Complete agreement granting a party an exclusive option to purchase real estate.

"Letter of contribution" to down payment

Letter and agreement for a relative (or other friend) to contribute to the down payment to purchase a home.

Real estate brokerage agreement- exclusive listing

Standard agreement for real estate broker to obtain an exclusive listing. Some localities board of realtors may require that their form be used. However, this form does contain the required terms.

Real estate brokerage agreement- non-exclusive listing

Standard agreement for real estate broker to obtain an non-

exclusive listing. Some localities board of realtors may require that their form be used. However, this form does contain the required terms.

Real estate brokerage agreement- exchange

This is an agreement to list a property for a tax free exchange of property, with or without boot.

Satisfaction of mortgage/deed of trust

Generic form that can be used to satisfy and deed or mortgage.

Escrow agreement

Creates an escrow agreement which can be used in conjunction with the purchase and sale of real estate.

Uniform quit-claim deed

This is a form of quit claim which should be able to be used in all states which do not have a specific or accepted form. A quit claim deed is used to clear title, and the seller does not guarantee that the title is clear.

REAL ESTATE LEASES

This area contains leases and forms related to the administration of lease.

Commercial Lease

This prepares a simple commercial lease.

Commercial lease, building

A short form lease. This form is used for the leasing of an entire building by a single tenant.

Lease with option to purchase

A form of lease, either for commercial or residential which also provides an option to purchase.

Residential lease- services as part rent

A lease which provides that the tenant must both pay rent and perform services.

Residential lease- short form

Short form residential lease.

Lease agreement- unfurnished home

Short form residential lease for an unfurnished home.

Notice to quit or pay rent

Notice usually required prior to eviction of a tenant.

Modification of lease

A comprehensive form which allows for any type of lease modification, including change of term, rent, etc.

Application for tenant

A form for a tenant to make an application to rent. Prepares a blank for the tenant to fill out by hand.

CONTRACTING/REMODELING

This category covers remodeling and contracting.

Contract agreement, small job

Agreement for a relatively small repair.

Contracting agreement, larger job

Agreement for a larger repair job which may involved stages and progress payments.

Satisfaction of mechanic's lien

Form to prepare a satisfaction of a mechanic's lien.

BORROWING AND LENDING

This category includes notes, guarantees of debts and forms used in regard to borrowing or lending.

NOTES AND SECURITY AGREEMENTS

This category contains promissory notes and security agreements.

Bankruptcy Proof of Claim

Standard long form bankruptcy proof of claim.

FTC Notice to Co-signers

For which is set by the FTC and must be given as a warning to those who guarantee a debt for others in consumer transactions. Also useful in business transactions.

Guarantee forms

Prepares several different types of guarantees: unconditional, limited in amount and unlimited in amount.

Security agreement

Prepares a security agreement or pledge of an asset for another persons debt.

Promissory note (installment, demand, due date)

Prepares a promissory note, either due on demand, in installments or on a date certain. Also provides for guarantors as an option.

Notice of default on note

Used to notify a person that they have failed to pay a note and that the note must be paid.

Offer to settle debt in dispute

If someone sends a bill that you disagree with, this form can be used to note the dispute, but to offer a reduced amount in settlement.

Offer to compromise debt

Form used to accept less from a person who has difficulty in paying a debt.

Revocation of guarantee

Although revoking a guarantee does not avoid past liability it does prevent further liability from being incurred in most cases.

RELEASES, GUARANTEES AND DEBT DISPUTES

Contains releases, guarantees and forms for the settlement of disputes related to debts.

Agreement to compromise debt

An agreement for a compromise of a disputed debt.

Notice of default

Prepares a notice that a note is in default.

Unconditional guarantee

Prepares an unconditional guarantee of a debts, either for a specific or unlimited amount.

Revocation of guarantee

Although revoking a guarantee does not avoid past liability it does prevent further liability from being incurred in most cases.

CREDIT REPAIR

Contains forms for consumers who are dealing with credit reporting agencies.

Demand for consumer statement

This form letter is used after you have objected to credit information, and the credit bureau has declined to change its information. This form exercises your right to add your own statement to your credit file.

Request for disclosure of information sources

If a creditor uses information other than from a credit bureau to deny you credit, you may require them to disclose their source for the information, using this form.

Request to review credit file

This form can be used to obtain a free copy of your credit report after you have been denied credit; or a paid copy under any circumstances.

SALES OF PERSONAL PROPERTY

This category includes sales of personal property, returns of defective merchandise, consignments and automobiles.

SALES- PERSONAL PROPERTY

This category provides bills of sale, bailments and other forms related to personal property sales.

Bill of sale- used goods, consumer

Bill of sale that can be used for any personal property except for automobiles. (There are separate forms for automobile sales.)

Consignment sales agreement

This is an agreement for a consignment sale. Consignments are often made by home arts and crafts hobbies or businesses and many misunderstandings can occur. This form clears up these issues.

Revocation of acceptance

This form is used to return goods.

SALES- AUTOMOBILES

This category provides forms related to engineering performed by in house employees as well as the licensee, such as the designation of chief operators.

Automobile sale-- odometer statement (federal law)

Federal laws require that when automobiles are sold that the mileage be stated. This form is used to obtain a disclosure of the reading on the odometer and whether the reading is as shown, as a result of a new odometer being installed, or over the 100,000 mile

or other roll over point.

Automobile bill of sale

This is a bill of sale for an automobile. Covers issues such as guarantees (or lack thereof).

Automobile sale power of attorney

This form provides that another person may execute various documents related to the sale of a motor vehicle. Often used by dealers to speed along the process as to sales of trade ins.

Automobile bailment (borrowing)

This form should be used when someone borrows a car for an extended period. Covers issues such as repairs and maintenance.

Automobile Consignment Sale

Prepares an agreement to consign an automobile for sale. This is becoming a popular practice. This form covers all issues related to this type transaction.

Offer to purchase automobile

Like a real estate deal, a person can submit a formal offer to the owner of a car for the purchase of the car. Upon signature this becomes a binding agreement for the sale and purchase.

Automobile proof of loss

Form to make claim for collision, theft or other loss for damages to a motor vehicle.

"Lemon law" notice

Notice that a claim is being made under the lemon law for a car that meets lemon law rules.

SMALL BUSINESS

This category provides forms related to small business.

CORPORATIONS

This category contains corporate documents such as shareholders agreements, sale of stock and other issues.

Agreement for sale of unregistered stock

An agreement which can be used for the purchase and sale of any stock not listed on an exchange. Allows for all cash or part cash part credit sales.

Shareholder's agreement

An agreement needed by all small corporations. Provides for orderly sales, elections and deadlock resolution.

Legal checkup form

A short questionnaire which shows if you have any legal issues lurking.

Independent Contracting Form

Prepares a contract for an independent contractor to perform services.

Job offer

This form may be used by any type business, not just a corporation to offer a job.

PARTNERSHIPS

This selection contains forms concerning forming and dissolving partnerships.

General partnership- small firm

A form of partnership which is usable for small firms with a capital of \$30,000 or less.

Dissolution of partnership agreement

Agreement for handling the wind up of a partnership.

POWERS OF ATTORNEY AND LIVING WILLS

Forms related to creating or revoking powers of attorney are provided in this category, as well as living wills.

POWERS OF ATTORNEY

This category concerns powers of attorney, including revoking them.

Simple Power of Attorney

This is a power of attorney that provides for the major reasons why a power of attorney may be desired including obtaining records, executing documents or acting for another.

Durable Power of Attorney

This form is used for creation of a power of attorney that does not lapse upon the incapacity of the principal (person giving the power).

Medical Power of attorney for health care

This form is used in conjunction with living wills to provide a mechanism for a person's desire as to medical care being made known in the event of that person's disability.

Certification that Power of Attorney remains in effect

Required if a party desires proof that a power of attorney is still in effect.

Revocation of Power of Attorney

This form may be used to revoke a power of attorney of any form.

Power of attorney to sell automobile

This is a power of attorney used for having another person sign papers related to a sale of an automobile. Often sought by auto dealers to speed along title work.

Power of attorney for minor children

This form should be prepared when a child will be in the custody of another adult for a prolonged period. Covers numerous contingencies including health care and school issues.

Power of attorney- health care

Prepares a power of that permits someone to make health care decisions for another person after someone is determined to be incompetent.

LIVING WILLS

This category contains living wills, revocation of living wills and powers of attorney for health care.

Uniform Living Will

Living will for use in all states.

Continue Care (Reverse Living Will)

A form which states that you want all possible medical care, even after a terminal diagnosis.

Revocation of living will

Prepares a revocation of all previous living wills.

Medical Power of attorney for health care

This form is used in conjunction with living wills to provide a mechanism for a person's desire as to medical care being made known in the event of that person's disability.

FAMILY LAW

This category provides forms related marriage, divorce, non-marriage relationships and children. Also includes affidavit and miscellaneous forms.

MARRIAGE AND DIVORCE

Within this category you will find forms related to non-marriage ("living together"), pre-marital agreements, separation, divorce and reconciliation.

Non marriage "living together" agreement

For those who may intend to cohabit without marriage, this form should be used to clarify the legal rights and responsibilities of the parties. This agreement can be used to set the rights between the parties in several different ways depending on the desires of the parties.

Pre-marital agreement

This agreement can be used to prepare as detailed, or brief, a pre-marital agreement as is desired. Many different forms of pre-marital agreements can be generated including issues like alimony, inheritance and other matters.

Divorce agreement

Although persons who are divorcing have proved that they are not compatible, sometimes they can agree on some issues and agree to fight on others. This form prepares a divorce agreement which can contain agreements regarding inheritance, child visitation, division of debts, item by item.

Reconciliation agreement

If a married couple has separated this agreement can be used when the parties reconcile to "undo" the effect of any separation or separation agreement.

CHILDREN

Forms related to children and property rights of children (transfers to minors.)

Designation of preference of guardian for children

A document used to express the parents desires for preference in the appointment of a guardian for children.

Permission for child to go on a trip

Form which provides authority for a child to go on a trip, allows the adults who are chaperoning the trip to obtain emergency medical care for the children.

Gift under gifts to minors act

Prepares a gift under gifts to minors act.

Power of attorney for adult regarding child

This form prepares a power of attorney for an adult who will be taking care of a child over a long term.

Child custody, temporary change

An agreement for a temporary change in child custody between parents. This agreement assumes that the parties will honor a written agreement. However, this agreement could be entered before the court.

Child custody, permanent change

An agreement for a permanent change in child custody between parents. This agreement can be entered before the court.

MISCELLANEOUS

Contains forms like lottery pool agreements, affidavits.

Upgrade Offer Form- Special Savings

You may use this form to upgrade to the 700 document and library of statutes program, WINDOWS LAW LIBRARY PROFESSIONAL EDITION at special savings.

Lottery pooling agreement

Covers the problems which can occur if persons pool money to play the lottery together.

Affidavit- general form

A form which contains the beginning and end for an affidavit. The user will provide the middle.

California all purpose acknowledgement

A standardized notary clause used in California, appropriate for use whenever signatures are witnessed by an officer-- provided you are not annoyed by his/her/its/their generic use of pronoun(s).

Declaration under penalty of perjury- general form

A form which contains the beginning and end for a declaration under penalties of perjury. Most issues before the United States Government can be handled with a declaration rather than an affidavit.

Medical records release form

A generic form for release of medical records, whenever required.

Right of rescission

Provides notice that a transaction in which there is a right to cancel (like door to door sales for 3 days) is being avoided.

Bailment (Agreement to lend or borrow personal property)

This is an agreement which covers the many things that can happen when one person borrows or holds property for another. This form is intended to go over in advance issues such as the

responsibility for repairs, and the limitation of liability of the person who is allowing their goods to be borrowed.

INSURANCE AND OTHER LIABILITIES

Contains insurance claim forms and release forms.

INSURANCE CLAIMS

Forms for making insurance claims.

Proof of loss- building/personal property

Form which follows insurance industry standard forms for proof of losses (claims) to the company.

Proof of loss- automobile

Form which prepares proof of loss for automobile physical damage, theft and other perils.

RELEASES

Releases of liability.

Mutual release

Form used when persons have and settle a dispute. Provides complete release, although specific obligations can continue. This may be useful if a note is given to settle a suit.

Uni-lateral release

Form used when one person is releasing another one.