

NYSBA Estate Planning System

Table of Contents (Partial List)

1. Wills

- a. General non-taxable estate
- b. Credit shelter will
- c. Non-citizen QDOT
- d. Pour-over will

2. Trusts

- a. Revocable trust
- b. Retirement pass-through trust
- c. Life insurance trust
- d. Supplemental needs trust
 - i. Payback trust
 - ii. Sole benefit trust
 - iii. 3rd Party S.N.T.
- e. Medicaid trust
- f. Qualified personal residence trust
- g. Sprinkling trust

3. Codicils

4. Premarital agreement

5. Post-marital agreement

6. Personal care contract

7. Statutory power of attorney

8. Health care proxy (i.e., living will)

9. HIPAA information release authorization form

10. Other documents