

ESTATE PLANNING AND WILL DRAFTING IN NEW YORK — 2023 REVISION

INDEX OF FORMS

IMPORTANT: Several documents in this collection are identified as “SAMPLES” (e.g. the various types of wills). As such, they include details of specific fact patterns and fictitious data. Samples, like generic forms, must be reviewed and evaluated very carefully and modified based upon the particular situation where they are being applied.

See the printed publication for further clarification and options.

CH 1 Appx A	Estate Planning Questionnaire
CH 1 Appx B	Estate Planning Checklists
CH 3 Appx	To download the most current versions of the sample tax forms in this section, visit www.tax.ny.gov
CH 4 Appx A	Pourover Will (will pours over into revocable trust, with alternate disposition) (Sample)
CH 4 Appx B	Will (spouse with minor children—no tax issues) (Sample)
CH 4 Appx C	Will with Provisions for Miscellaneous Gifts (Sample)
CH 4 Appx D	Will for Married Person with Minor Children and No Anticipated Federal Estate Tax (Sample)
CH 4 Appx E	Will for Individual with no Spouse or Children and less than \$1.5 million in Assets (Sample)
CH 5 Appx A	Credit Shelter / QTIP Will for Husband and Wife with Adult Children (Sample)
CH 5 Appx B	Disclaimer Will for Husband and Wife with Adult Children (Sample)
CH 6 Appx A	Revocable Trust with Settlor Acting as Sole Trustee (Sample)
CH 6 Appx B	Revocable Trust with Settlor Acting as Sole Trustee (Alternate Version) (Sample)
CH 6 Appx C	HIPAA Authorization to Allow Trustee’s Doctor to Give Information to Facilitate Change of Trustee (Authorization for the release of health information) (Sample)
CH 8 Appx	# Uniform Table of Distribution
CH 9 Appx	Irrevocable Unfunded Life Insurance Trust (Sample)
CH 10 Appx A	Retainer Letter (For Matrimonial Cases Only including Statement of Client’s Rights and responsibilities) (Sample)

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CH 10 Appx B	Prenuptial Agreement (Both Parties Financially Independent, including Alternative and Additional Clauses) (Sample)
CH 10 Appx C	Divorce Agreement (Sample)
CH 10 Appx D	Separation Agreement including: Memorandum of Separation Agreement (Merged)
CH 10 Appx E	Cohabitation Agreement to Be Tailored to Specific Facts (Sample)
CH 11 Appx A-1	New York Statutory Short Form Power of Attorney (2021)
CH 11 Appx A-2	Suggested Language for Permissible Modifications to the New York Statutory Short Form Power of Attorney
CH 11 Appx A-3	* Introduction – New York Statutory Short Form Power of Attorney
CH 11 Appx A-4	* FAQs – New York Statutory Short Form Power of Attorney
CH 11 Appx B-1	Health Care Proxy
CH 11 Appx B-2	Living Will
CH 11 Appx B-3	Living Will and Health Care Proxy
CH 11 Appx C	* # 2023 Medicaid Regional Rates for Calculating Nursing Home Ineligibility Following Asset Transfers
CH 13 Appx A	Disclosure Concerning Attorney / Executor (Acknowledgement of Disclosure)
CH 13 Appx B	Disclosure Concerning Attorney/Executor-Trustee (Acknowledgement of Disclosure)
CH 13 Appx C	Estate Planning Engagement Letter Involving Dual Representation (Sample)
CH 13 Appx D	Estate Administration Engagement Letter Involving Dual Representation (Sample)