DRAFTING WILLS AND TRUST AGREEMENTS ON GHOSTFILL™
SUMMARY OF DOCUMENTS AND FEATURES

SUMMARY OF DOCUMENTS AVAILABLE IN *DWTA*

The following list serves as a high-level summary of the types of documents offered in *Drafting Wills and Trust Agreements* (*DWTA*).

Wills

- Simple Will (basic will with no trust provisions)
- Long Form Will (includes numerous share/trust options for outright distributions, marital deduction planning, GST planning, and also planning for varying exclusion/exemption amounts set forth in EGTRRA)
- Pour-over Will (companion will document for single settlor revocable trust)
- Joint Property Pour-over Will (companion will document for joint property trust)
- Community Property Pour-over Will (companion will document for community property trust)

Revocable Trusts

- Single Settlor Revocable Trust (numerous share/trust options similar to those offered in the long form will)
- Joint Property Trust
- Community Property Trust
- Qualified Domestic Trust

Amending Documents

- Trust Amendment; Trust Amendment and Restatement
- Codicil

Irrevocable Trusts

- Irrevocable Long-Term GST Trust
- Irrevocable Life Insurance (Crummey) Trust
- Irrevocable 2503(c) Trust for Minors
- Irrevocable Charitable Remainder Trusts (Annuity and Unitrust)
- Irrevocable Grantor Retained Trusts (Annuity and Unitrust)
- Irrevocable Intentionally Defective Grantor Trust
- Irrevocable I.R.A. Management ("Conduit") Trust
- Irrevocable Supplemental Needs Trust
- Irrevocable Qualified Personal Residence Trust

Powers of Attorney and Health Care Directives

- General Power of Attorney (non-statutory) - Long Form and Short Form options
- Special DPA to Sell Real Estate; Special DPA to Buy Real Estate
- Special DPA for Investments; Special DPA for Gifts
- Special DPA for Pourover to Trust
- Special DPA for Health Care; Living Will (Generic)
- State Statutory Advance Directives (coverage includes all states that have issued statutory forms for powers of attorney and health care directives)

Letters

- Engagement Letter; Appointment Letter
- Transmittal Letter
- Statement Letter; Statement
- Closing Letter
- Power of Attorney Letters (including: Retaining Original DPA; Information to Client)

Supplemental Documents

- Estate Analysis Checklist (Client Intake Form) - Long Form and Short Form options
- Funeral/Memorial Service Instructions
- Medical Records Information Release
- Bill of Sale to Trust
- Assignment to Trust
- Promissory Note
- Certification of Trust
- Guidelines for Personal Representative
- Guidelines for Trustee
- Power of Attorney Supporting Documents (including: Client Brochure; Guidelines for Agent; Certification of Authorization; Revocation of Power of Attorney; Certificate of Authority; Certificate of Incumbency; Affidavit of Agent; Declaration Regarding Life Sustaining Treatment; Notice to Medical Personnel)

User-Defined Documents (create or import any number of additional documents into the system; add variables to these documents to auto-fill answers into your own custom user-defined documents)
Flowcharts (sample and client-specific)
Client Reports (summarize selected client data for record-keeping purposes)

SUMMARY OF SELECTED FUNCTIONALITY/FEATURES

Some of the numerous special features available in *DWTA* include:

- **Per Seat Licensing** (subscribe to *DWTA* based on the number of seats (aka "computers") requiring installation of the product)
- **Sample Flowcharts** (view/edit/print from a selection of sample flowcharts to show clients a pictorial representation of a recommended plan)
- **Client-Specific Flowcharts** (view/edit/print flowcharts that demonstrate the actual flow of assets through the estate based on the document created for that client)
- **Preferences for System Defaults** (enter standard information and preferences for wording to apply to all documents created in the system)
- **Document Styles/Formatting** (set up document formatting preferences for each document type)
- **User-Defined Clauses** (create clauses for topics that are not included in the system options; user-defined clauses are made available as part of the document interview process)
- **Customization of System Text** (modify any of the 2000+ system clauses to suit personal language preferences or state requirements either at the system level or for a particular client)
- **Model Interviews** (answer one or more document interviews for a client and turn that set of answers into a model that can then be applied automatically to any subsequent client that requires that particular estate plan)
- **Client Utilities** (copy, import, export, or archive client answer sets)
- **Document/Clause Preview** (preview clauses from within interview dialogs based on the interview selections made on that dialog, or preview the document from within the document preview)
- **Document Manager** (track the documents created in the system for a particular client and include comments regarding each document)
- **Footer Modification** (modify/customize footer text for all the system documents)
- **Clause History Review** (view clauses that have been modified or added with a particular release)

Visit the *DWTA* web page (http://west.thomson.com/dwta) for additional information, including licensing information, product reviews, and a sample demo.

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