Norris Modern Wills Volume

Modern Will:

1. No more confusion regarding which Will to select; all options are wrapped into one Will for non-taxable estates
2. Spouse's Will and other estate planning documents can be assembled at the same time using the same case information
3. Option for standard footers, which includes initial lines, page numbering, and title "Last Will of [name]"
4. Streamlined assembly process, reducing the number of questions asked while providing more options
5. Built out for blended families
6. Option for separate distribution of personal property and household effects
7. Option for gift of principal residence
8. Option for gift of retirement plan to spouse
9. Clear and concise language, easy for your client to understand
10. Replaced per stirpes distribution with per capita with representation
11. Language granting executor discretion
12. Improved definitions
13. Removed payment of debts and expenses paragraph so as not to create an obligation
14. More options in distribution of residuary estate, including fractional shares
15. More contingent trust options
16. New Potential Supplemental Needs Trust
17. Option for residue to pourover to trust
18. Contingent beneficiaries (disaster clause)
19. Co-guardians for minor child specified
20. Compound numbering to help reference provisions
21. Trust options will include contingency (set up a beneficiary's share in trust if they're under a certain age/incapacitated/in bankruptcy or divorce proceedings/incarcerated), supplemental needs (to take care of a named beneficiary), and pourover (to a living revocable trust).
22. Improved signing sections
23. Thorough handling of disinherited family members
24. Option to leave a letter of instruction to executor regarding distribution of personal items, with blank letter to include for your client
25. More options to come, including disclaimers and pet trusts

Other forms:

1. Intakes designed with your client in mind, with clear direction and easy entering of information
2. Confirmation of Information (to give client as an overview summary for approval) **biggest timesaver in conjunction with intakes
3. Intake for assets, easy incorporation for exhibit of property to fund trust
4. Option for standard footers in ancillary documents (like PoAs, Designation of Health Care Agent, etc.), which includes the title and page numbering
5. Streamlined ancillary documents, presenting information consistently
6. Updated Living Revocable Trusts
7. Personal Property Memorandums (to go with LRTs)
8. Will Signing Ceremony
9. Releases for children signed by one or both parents
10. Quick presets are available for modern or traditional style, but formatting is still customizable for your firm. Modern presets implemented from style guides from Matthew Butterick and Bryan Garner
11. Everything you need to provide a complete Will package in an impressive presentation to your client
12. Modern Will Cover Page - great for customizing
13. Large list of ancillary forms to include, with a streamlined and cohesive look
14. Volume wide: improved sections for signing, with larger signature lines, consistent presentation, and clear dating (which also help prove capacity at signing)

Note:

1. Separate Advanced Estate Planning volume for taxable estates, drafted and vetted by board certified tax planning attorneys

2. Discontinued TXdocs Basic Wills still available for those who prefer them

3. This sophisticated system does NOT take the place of a licensed attorney. TXdocs gathers the details from the client that an attorney will need but leaves the substantive decisions to the professional to determine after consultation.

4. You can assemble forms in both Advanced Estate Planning and Norris Modern Wills. Many answers will carry over automatically.

5. We will keep adding to and improving this volume! Let us know what you think and how it can be even more useful in your practice.