

## **\$100 Discount Certificate for PrePaid Legal Members for a Revocable Living Trust**

Any person having current PrePaid Legal Membership can have a \$100 discount off of the standard price of \$595 for the preparation of a Revocable Living Trust for their family. The Trust documents will be prepared for you according to the legal requirements of the state of your residence and includes the following provisions:

Letter of Intent	Minutes of the Trust
Summarization of Trust	Springing or Standard Durable
Trust Particulars (Certificate of Trust)	Power of Attorney
Funding & Trustee Instructions	Durable Power of Attorney for Health Care
Questions & Answers	Living Will & Physician's Directive
Glossary of Trust Terms	Pour-Over Will
Trust Document	Funeral Check List
Abstract of Trust	Duties of Successor Trustee
Trust Amendment forms	Settling the Estate
Schedule of Trust Assets	Bank, Stock & Bond Transfer forms
Important Document Finder	

The Trust will also include new property deeds transferring title of your real estate into your Revocable Living Trust (the residence deed is included; additional property deeds are \$25 each). All documents are prepared for your particular needs and desires and arrive signature-ready for you to meet with a Notary Public of your choice. Future consultation and amendment preparation are provided without further cost provided you continue your membership with PrePaid Legal, Inc.

### **Disclaimer**

1. A Revocable Living Trust will not affect your taxes nor will it shield you from lawsuits nor liens imposed by acts of law.
2. C. Hatcher of Hatcher & Associates, Certified Estate Planners is not an attorney nor does he practice law. He has prepared trust documents since 1988 and his documents have been reviewed by the IRS, numerous attorneys, and brokerage firms. Mr. Hatcher works with a number of attorneys for complex issues involving living trusts and was certified under an American Bar Association program through a California law firm. Mr. Hatcher is not affiliated with PrePaid Legal in any manner and is entirely independent from PrePaid Legal.
3. You should determine whether a trust is in your best interest and you should carefully discuss this with your family, your CPA, and your attorney.
4. A general, written estate plan will be included with your trust suggesting prudent insurance coverage for your particular needs. You are free to purchase, or not purchase, recommended insurance products through any agent of your choosing.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Your PrePaid Legal Membership #

**Hatcher & Associates Certified Estate Planners**  
 121 East Orangeburg Ave., Suite 10, Modesto, Ca. 95350  
 209-574-9451 FAX 209-574-9279 email hatcher@thevision.net  
**Revocable Living Trust Application Form**

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Client's Full Legal Name      Date of Birth      Social Security Number      Telephone Number

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Spouse's Full Legal Name      Date of Birth      Social Security Number      Telephone Number

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Street Address      City      County      Zip Code

Client U.S. Citizen?  Yes  No      Spouse U.S. Citizen?  Yes  No

**Trust Type** Single  Marital  A/B  Q-TIP  Q-DOT

(Single is for one person [or one spouse in a marriage with a separate estate], Marital is for a couple with a net estate worth less than \$1,000,000; A/B is for a couple with a net estate exceeding \$1,000,000; Q-TIP is for a married couple with previous marriages and children from each marriage or which own an S-Corp.; QDOT is for a married couple where one spouse is not a U.S. Citizen.)

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Initial Trustees

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Successor Trustees  Individual by rank or  Co-trustees to serve together

The Settlers are lifetime beneficiaries. Listed below are the Beneficiaries (Heirs) to the Trust Estate

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Name	Relationship	Age	Per Centage of Estate of Particular Asset
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Name	Relationship	Age	Per Centage of Estate of Particular Asset
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Name	Relationship	Age	Per Centage of Estate of Particular Asset
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Name	Relationship	Age	Per Centage of Estate of Particular Asset
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Name	Relationship	Age	Per Centage of Estate of Particular Asset
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Name	Relationship	Age	Per Centage of Estate of Particular Asset
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Per Stirpes: if the beneficiary dies early their inheritance goes to their offspring.  
 Right of Representation: if the Beneficiary dies early their intended inheritance is divided among the other Trust Beneficiaries.

**Disinherit:**

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Name	Relationship
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**IMPORTANT!! IF YOU OWN REAL ESTATE INCLUDE COPIES OF YOUR DEEDS WITH THIS APPLICATION. NEW DEEDS WILL BE PREPARED REVOCATNG TITLE OF YOUR REAL ESTATE TO YOUR REVOCABLE LIVING TRUST.**

**POUR-OVER WILL**

This is part of the Revocable Living Trust and is exempt from Probate. It passes assets of the estate into the trust for distribution among the trust beneficiaries. If the Settlor(s) neglected to list an asset(s) in the Schedule of Trust Assets with an aggregate value of less than \$100,000 the Pour-Over Will does this automatically. Neglected assets which exceed \$100,000 not listed in the Schedule of Trust Assets must undergo formal probate before being distributed to the trust beneficiaries. In the Pour-Over Will the Settlor can also name Legal Guardians for minors and disabled dependents and, if the Settlers own any business interests, enter a Business Continuation Plan.

Client	Spouse		
1st Executor	1st Executor		
Street Address	City	State	Zip
2nd Executor	2nd Executor		
Street Address	City	State	Zip
3rd Executor	3rd Executor		
Street Address	City	State	Zip

Please name only a maximum of 3 for each Testator. If at a later time one or more cannot serve you can amend this with a Trust Amendment Form. [ ] Nominees to serve in this order.  
 [ ] Nominees are Co-Executri

**Special Needs Trust for:**

Name	Relationship
Bequest or Per Centage of Estate to be held in a Special Needs Spendthrift Trust	
Trustee/Guardian	Successor Trustee/Guardian

**Legal Powers of Attorney**

This person is one you know, love, and trust to make legal decisions for you and manage your trust estate if you become incapacitated There are two types: [ ] **Springing Power of Attorney** which takes effect on the signatures of two (2) attending M.D.s on their letterhead affirming you incapacitaton. Upon recovery this is reversible whith the signatures to two (2) M.D.s on their letterhead affirming you recovery; and the [ ] **Standard Durable Power of Attoreny** which is effected upon your signature. This should be considered only in the case of advanced age. In either case the power you grant to this person allows them to manage your estate including selling assets if that is necessary for your care. They cannot change your trust.

Client	Spouse		
1st Agent	1st Agent		
Address	Address		
2nd Agent	2nd Agent		
Address	Address		
3rd Agent	3rd Agent		
Address	Address		

**HEALTH CARE POWER OF ATTORNEY**

This document nominates a person you know, love, and trust to make health care decisions for you if you are unable to do so by yourself. When possible you should name people residing closely to you.

1st Agent	1st Agent
Address	Address
2nd Agent	2nd Agent
Address	Address
3rd Agent	3rd Agent
Address	Address

**YOUR RELIGIOUS AFFILIATION**

Protestant  Catholic  Jewish

**NAMES OF CHILDREN OF THE CLIENT AND SPOUSE**

**Client:**

Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age

**Spouse:**

Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age
Name	<input type="checkbox"/> This marriage	<input type="checkbox"/> Previous marriage	<input type="checkbox"/> Deceased	Age

If you have additional children list them on the back of this page.

### CURRENT INVENTORY OF ASSETS

The purpose of this section is to give the estate planner an overall understanding of your assets for the purpose of determining whether you need to do Estate Tax planning. In the year 2010 under current EGTRRA there will be no Federal estate tax. Unless Congress enacts new legislation, in the year 2011 the net estate exceeding \$1,000,000 may face estate tax losses. You should realize that assets increase in value over time. This is particularly true of real estate. An estate valued at \$400,000 today at an average 7% interest can grow to over \$1,103,612 in 15 years. Future values of assets need careful consideration.

<b>Asset</b>	<b>Gross Value</b>	<b>Indebtedness</b>	<b>Present Value</b>
Your Residence			
Other residential real estate (rentals, etc.)			
Commercial Real Estate			
Business Interests			
Current checking & savings accounts			
Stock & Bond accounts			
404(k), 403(b), Keoh, Traditional IRA accounts			
CDs, T-Bills, Money Market accounts, Roth IRAs			
Deferred annuities from Insurance Companies			
Notes Receivable (debts owed to you)			
Autos, Aircraft, Boats, etc.			
Precious Metals (gold, silver, etc.)			
Appraised Jewelry, Antiques, Art Objects			
Total Life Insurance Death Benefits			
Settlements in your favor			
Collectables (guns, tools, stamps, etc.)			

## CURRENT INSURANCE COVERAGE

- |  |                              |                             |
|--|------------------------------|-----------------------------|
| Do you have sufficient life insurance to pay your immediate debts?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have Long Term Care Insurance?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If you are age 65 or over, do you have Medi-Care Supplement Insurance?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have property & casualty insurance on your home and car?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If your estate is small, do you have Final Expense Insurance?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have Dental or Optical Insurance?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have a personal (as opposed to Employer) retirement plan?   | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| If you are a professional, do you have Income Disability Insurance?  | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| Do you have appreciated real estate you may want to consider converting to a tax advantaged income through a Charitable Remainder Trust? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

**HATCHER & ASSOCIATES, Certified Estate Planners**  
**121 E. ORANGEBURG AVE., SUITE 10, MODESTO, CA. 95350**  
**209-574-9451 \* FAX 209-574-9279**

**CLIENT INFORMATION AND DISCLOSURE**

PLEASE READ EACH ITEM:

1. Hatcher & Associates do not represent themselves to be attorneys nor a member of the California State Bar. Nor have they given any legal counsel to any parties. Hatcher & Associates is primarily a legal document preparation service with particular experience in estate planning and insurance products involved in estate planning. Purchasers have the right to purchase recommended insurance products from any agent of their choosing. A telephone interview will precede the preparation of any Living Trust to assure us of your understanding of all issues and that we have full understanding of your intentions.
2. A Revocable Living Trust will have no effect on the income tax liability of the Trustor(s), nor can a Revocable Living Trust shelter estate assets from law suits, bankruptcies, legal liens, nor tax liens. A Living Trust can be challenged by any named beneficiary petitioning for probate. This is uncommon but exists to protect the trust beneficiaries from unwilling or unable Successor Trustees and the function of their office. A Living Trust is not immune from losses associated with catastrophic medical expenses where the Trust owner applies for benefits under the Federal Medicaid Program (or similar programs provided by their State of residence).
3. It is the Trustor(s) personal responsibility to transfer their estate assets by re-titling them to the ownership of the Revocable Living Trust instrument. This includes deeds for all real estate holdings. New deeds will be provided for each Living Trust prepared but the client must see to their notarization and filing with the appropriate government body or Recorder's Office.
4. Trustor(s) have full authority to modify this trust in any manner through amendment included forms. A Living Trust may not be appropriate for small estates which could be administered through Summary Probate at lower costs than a traditional probate. Assets included in a properly prepared Living Trust are exempt from probate.
5. Any inaccuracies in the preparation of this Trust Instrument will be corrected without cost to Trustor(s).
6. Any questions concerning this Trust Instrument from Trustors or Successor Trustee(s) (following the death(s) of the Initial Trustor(s)) will be answered, without charge, by C. Hatcher, C.E.P. 121 E. Orangeburg Ave., Suite 10, Modesto, Ca. 95350 (Telephone 209-574-9451, FAX 209-574-9279) and/or staff attorneys of Hatcher & Associates.
7. Prior to purchasing a Living Trust the matter should be discussed at length with your family and tax advisor. 8. It is the Trustor's (Buyer's) responsibility to provide deeds to all real estate owned. Deeds may be FAXed to 209-574-9279. Deed copies are generally available from local Title Insurance companies for a nominal fee.
8. This special price is intended for PrePaid Legal participants only. There are no charges for future consultations or the preparation of amendments or trust changes AS LONG AS THE PURCHASER MAINTAINS THEIR PREPAID LEGAL MEMBERSHIP. IF THEIR MEMBERSHIP LAPSES OR ENDS THERE WILL BE STANDARD CHARGES FOR THESE ADDITIONAL SERVICES. HATCHER & ASSOCIATES ARE NOT ASSOCIATED WITH PREPAID LEGAL SERVICES, INC. AND THIS OFFER IS ESSENTIALLY THE SAME AS THOSE MADE TO OTHER GROUPS AND ASSOCIATIONS.
9. The Purchaser of this Revocable Living Trust has the right to:

"The Purchaser shall have the right to cancel his/ her/ their purchase and receive a full refund of any amount tendered for a period of five (5) days from the date of this purchase agreement/contract."

I/We have read the above information and have agreed to pay the sum of \$495.00 to purchase a Living Revocable Trust. Signed on \_\_\_\_\_ 200\_\_.

Cost of Trust Instrument\$        495.00

Additional property  
deeds at \$25 each x \_\_\_\_\_ \$ \_\_\_\_\_

Total                                \$ \_\_\_\_\_

\_\_\_\_\_  
Purchaser's Name (Printed)

\_\_\_\_\_  
Purchaser's Signature

\_\_\_\_\_  
Spouse's Name (Printed)

\_\_\_\_\_  
Spouse's Signature

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deeds at \$25 each x \_\_\_\_\_ \$ \_\_\_\_\_

Total                                        \$ \_\_\_\_\_

\_\_\_\_\_  
Purchaser's Name (Printed)

\_\_\_\_\_  
Purchaser's Signature

\_\_\_\_\_  
Spouse's Name (Printed)

\_\_\_\_\_  
Spouse's Signature