TERRY M. MALLERY, A PROFESSIONAL LAW CORPORATION
CHECKLIST OF ESTATE PLANNING DOCUMENTS

STATUS				ALLOCATION OF DUTIES		
NEED	**DRAFT**	**COMP**	**DOCUMENT**	**CLIENT**	**ATTORNEY**	**C.P.A.**
			Fee Agreement			
			Conflict of Interest – Spouse or other			
			Trust – Revocable – Restated			
			Trust – Irrevocable			
			Pour Over Will			
			Advance Health Care Directives			
			Durable Power of Attorney- Property and Financial			
			Transfer of Personal Property and Assignment			
			Deed to Trustee			
			Spousal Property Agreement			
			Certificate of Independent Review			
			Follow-up Letter Reminding Client to Review Estate Planning			
			Transmittal Letter re Originals w/advice			
			Document Record Book			
			Certification of Trust			
			Synopsis of Trust			
			Schedule A – List of Property			

D = DRAFT C = COMPLETED

Read and approved.

Dated: _____ _____