Petition to Terminate a Trust Form Digitization Project Biography

Robert Little

December 15, 2022

**Framing:**

Where there are trusts, there are disgruntled beneficiaries. Hopefully, with this process that I created, lawyers and clients alike can spend less time trying to fill out this form together, and now can seamlessly have either party quickly and accurately fill out the form online. Then being able to print out a filled out PDF for the legal counsel to review before submitting it to a probate court. It would be used by both legal professionals and lay person alike, and thus should be understandable and effective for both types of users.

**Research:**

Before the only way to fill it out was the actual form with no descriptive wording at all and only the legal terminology. When I noticed that this form was on the list of forms that the Suffolk Lit Lab had put up, I instantly gravitated to it. I saw the need for this document as I understand the pettiness and the bickering a family can do in the aftermath of a trust creation. It’s not very deep conceptually, however this one addition to the probate system may save someone some time.

**Ideation, User Testing, and Refinement:**

There was really no other way to go about creating this digitized document. The tools of the weaver and docassembol seemed like the only viable solution to getting this form filled out and doing so by asking fast, easy, and understandable questions. After the creation of my questions, I sent the document out to three fellow law students and three of my friends outside of the law school in various non legal fields. I asked them to complete a very early version of the questionnaire to see how they understood the questions. The law students stated that the wording was framed in a way they could understand it no problem, while the non-law students stated that the terms and questions seemed confusing. These responses are in the same file on GitHub as this document. They are labeled as two letter initials of the user.

I took this information and adapted it. I reworked the questions to be less technical and reorganized the flow of the questions to give some breathing room for the petitioner. This can be shown in the multiple commitments made on GitHub.

**Complexity, Impact, and Completeness:**

This document requires only basic issue specific knowledge and the ability to type in English. The user needs to do no work in order for this form to be completed and printed out. This document is probably less than 20 clicks. Having a client come in with this form already filed out and presented to an attorney can save the attorney so much time. The story of the beneficiaries is written clearly on the form and all parties are named, labeled, and available to contact. All clients are different, having them filing this form prior to a meeting and then adjusting it at the meeting would save attorneys time and the possibility of filing errors. All users said that the experience was easy to follow and to work through on click the button and move on kind of way. Of course, non legal professionals may not know what all the titles mean, however a person actually in the trust termination situation would have a better understanding then these users.

**Future Improvement and Sustainability:**

Sadly, with my knowledge of coding in docassemble being in the region of single celled organism, I struggled to put my name on the source code. After working with Michelle in office hours for significant lengthy periods, we were able to sort out all the issue that had been presented in order to establish a minimum viable product. Now I know that these questions could be modified even further to create a simple and more understandable path for non-legal users. I also feel that information on definitions would have been greatly appreciated by some users. A further issue is the questioning of the tick box questions on the second page of the form. These are rather confusing and could be easily looked over. A change would be to These are all issues that could be addressed in order to improve this process by someone much more inelegant than me.

Something that I feel strongly about is removing the signature block from the document. I feel that allowing a petitioner to sign a document that will have to be reviewed by an attorney, then have the attorney sign, then file it physically with the probate court is silly. I think the value of a signature should be respected and people should only put their name on things when they are fully aware of its consequences. Should this document be used further, that is an issue for debate. However, as it is my minimum viable product, I took the action I felt the most comfortable with.

The beautiful thing about this project is that once it is in a state of viability, it will never need to be updated or maintained unless the actual trust termination form is changed. This allows developers to essentially let it run itself.

I know that this could never answer all of your questions as I still don’t even know what I actually did to get it to this state. A blur of colons and plural names. I hope that it was able to present a picture of what work was done in order to get this document top MVP status.