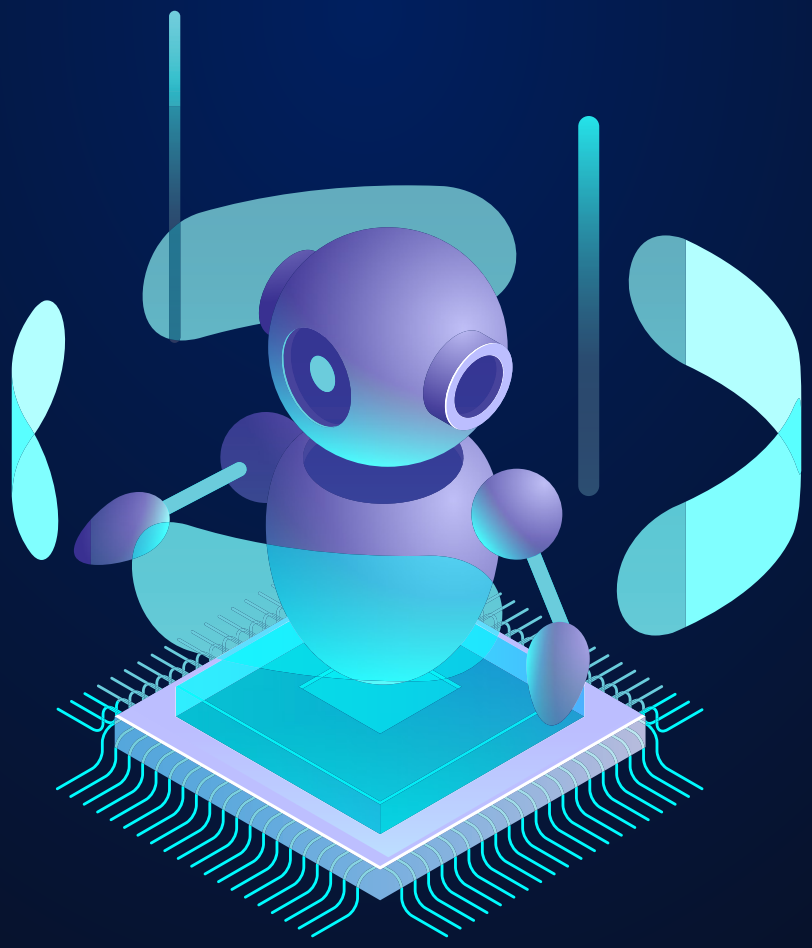
NY ESTATE LAW .AI

GENUINE LAWYERS, AI VALUE

YOUR FREE ESTATE PLANNING TEMPLATE

This Estate Plan Template is designed to help you organize your assets, define your wishes, and ensure that your loved ones are taken care of according to your desires. This template covers the essential elements of estate planning, but it's advisable to consult with a legal professional to ensure all legal requirements are met.



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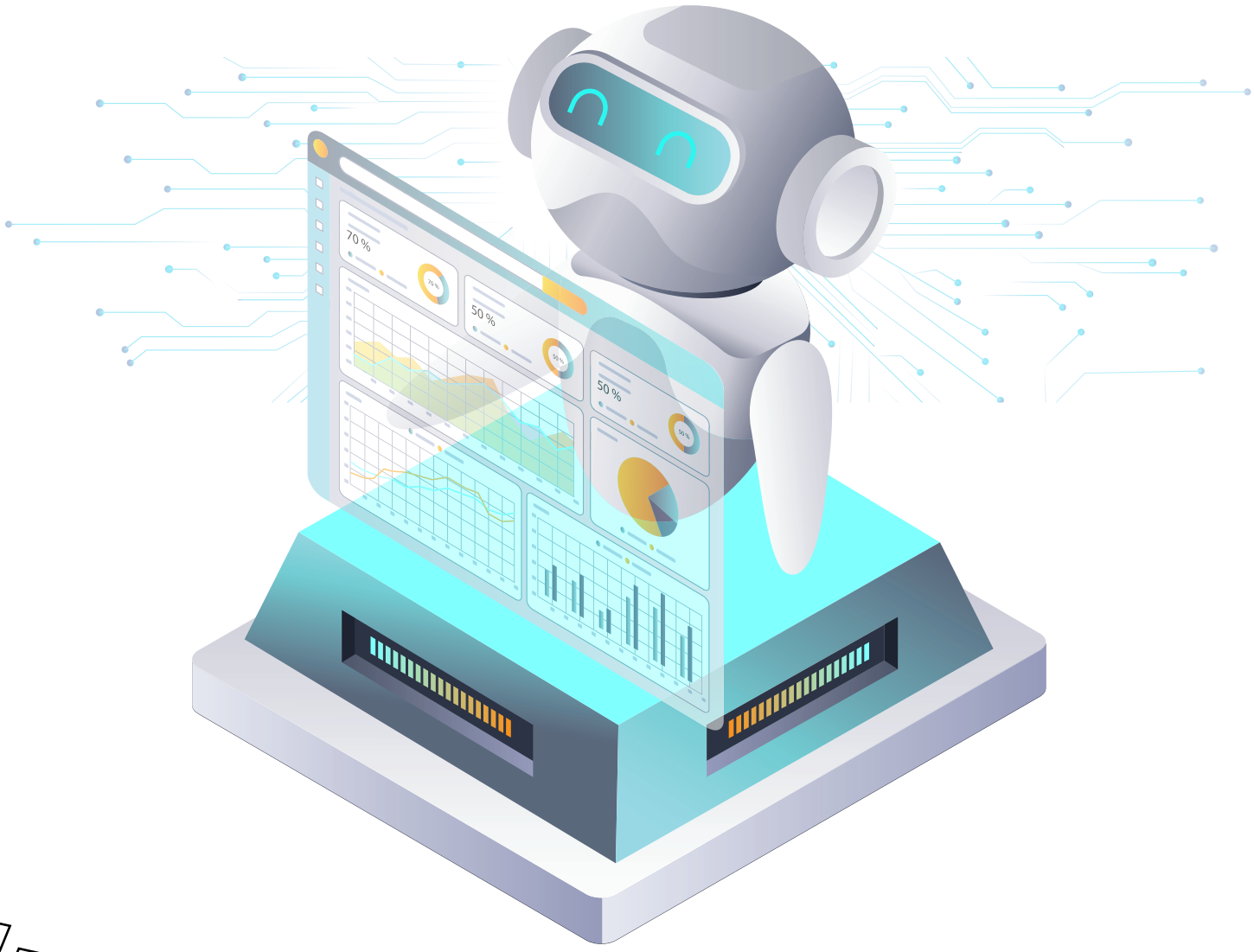
WHY CHOOSE NY ESTATE LAW .AI

Choosing NY Estate Law .ai is the right decision because it offers a unique blend of technology and personalized legal service. With AI-powered onboarding, you can efficiently select from affordable estate planning packages like our Revocable Trust Package or Irrevocable Trust Package, with transparent, reasonable pricing to start, and unbelievable additional saving up to 30% more for using our AI Onboarding process. For those preferring a personal touch, human consultations are available with a commitment to VIP treatment. The firm guarantees 100% satisfaction, with a full refund or the option to apply the purchase price toward a custom plan if your selected package isn't a perfect fit after speaking with our attorney.

Contact NY Estate Law .ai today to schedule a consultation and take the next step toward securing your family's future.



1 PERSONAL INFORMATION

Full Legal Name: _____

Date of Birth: _____

Social Security Number: _____

Address: _____

Phone Number: _____

Email Address: _____

2 IMMEDIATE FAMILY MEMBERS

Spouse/Partner's Name: _____

Children's Names and Dates of Birth: _____

Other Dependents' Names and Relationships: _____

3 TRUST

Type of Trust (e.g., Revocable, Irrevocable): _____

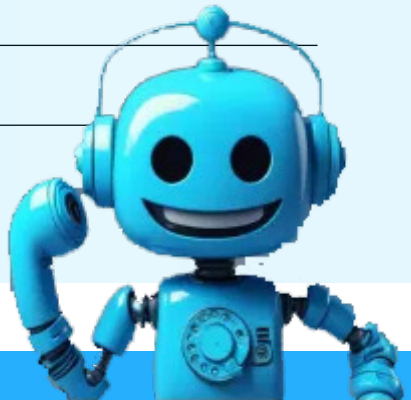
Trustee's Full Name: _____

Relationship to You: _____

Trustee's Contact Information: _____

Beneficiaries' Names: _____

Assets Placed in Trust: _____



4 WILL EXECUTOR INFORMATION

Executor's Full Name: _____

Relationship to You: _____

Executor's Contact Information: _____

Alternate Executor's Name
(if the primary executor cannot serve): _____

Alternate Executor's Contact Information: _____

5 POWER OF ATTORNEY

Agent's Full Name: _____

Relationship to You: _____

Agent's Contact Information: _____

Alternate Agent's Name: _____

Alternate Agent's Contact Information: _____

6 HEALTH CARE PROXY (MEDICAL POWER OF ATTORNEY)

Health Care Proxy's Full Name: _____

Relationship to You: _____

Proxy's Contact Information: _____

Alternate Proxy's Name: _____

Alternate Proxy's Contact Information: _____

7 LAST WILL AND TESTAMENT

List of Beneficiaries: _____

Full Name: _____

Relationship to You: _____

Assets to be Inherited: _____

Specific Bequests
(Items of Sentimental or Monetary Value): _____

Item: _____

Beneficiary's Name: _____

Guardian for Minor Children (if applicable): _____

Full Name: _____

Relationship to You: _____

Contact Information: _____

8 DIGITAL ASSETS

Online Accounts (e.g., Social Media, Email): _____

Login Information: _____

Instructions for Handling Digital Assets: _____

9 FUNERAL AND BURIAL WISHES

Funeral Home Preference: _____

Type of Service (e.g., Religious, Secular): _____

Burial or Cremation Preference: _____

Special Instructions: _____

10 OTHER IMPORTANT INFORMATION

Insurance Policies: _____

Type of Policy: _____

Policy Number: _____

Beneficiaries: _____

Bank Accounts: _____

Bank Name: _____

Account Numbers: _____

Beneficiaries: _____

Investment Accounts: _____

Type of Investment: _____

Account Numbers: _____

Beneficiaries: _____

Real Estate Properties: _____

Property Address: _____

Deed Information: _____

Beneficiaries: _____

11 SIGNATURE AND NOTARIZATION

Signature: _____

Date: _____

Witnesses' Names and Signatures: _____

Ensure that your estate plan is signed in the presence of a notary public and any required witnesses to make it legally binding.

12 CHECKLIST

Complete all sections of the template.

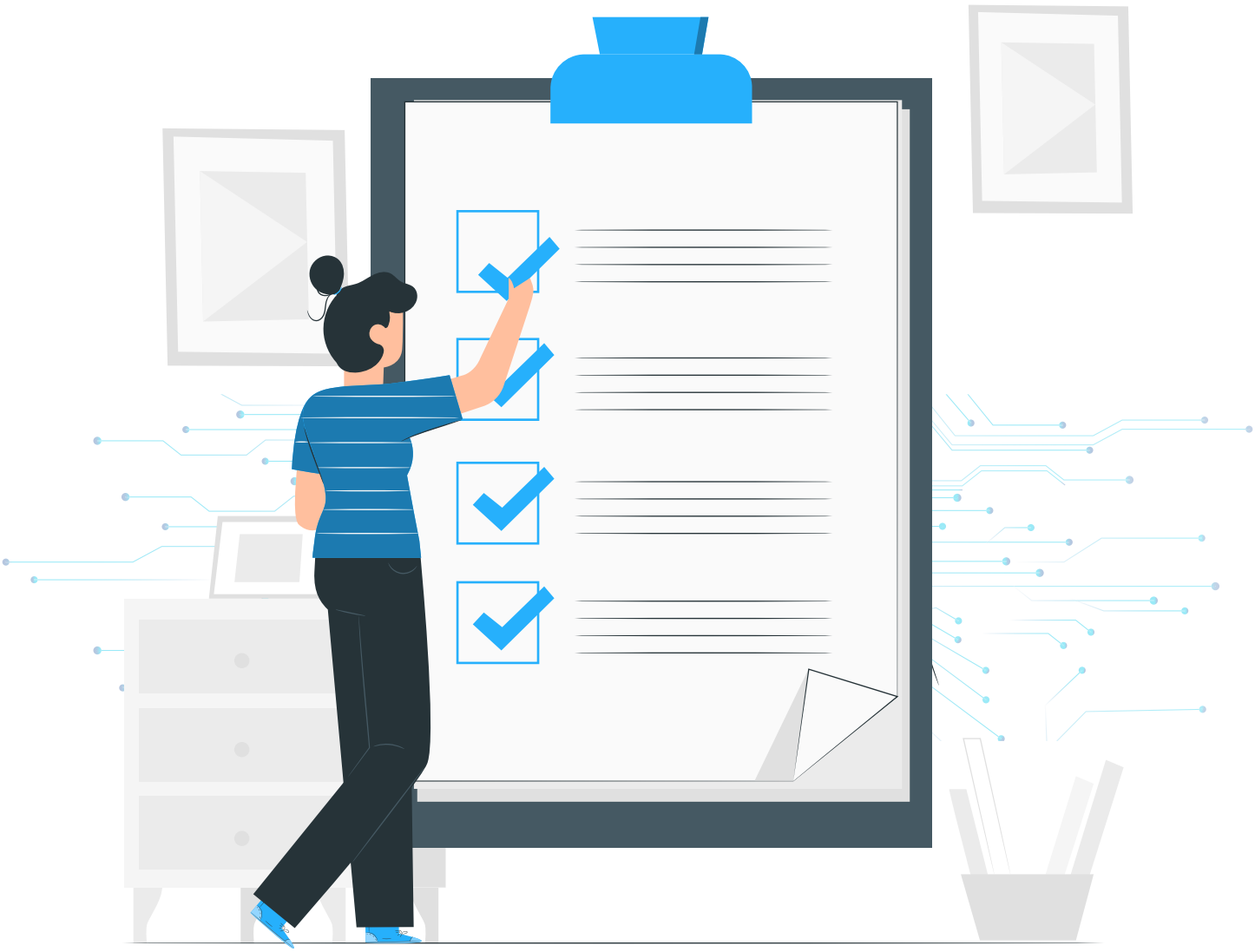
Review and update as needed.

Consult a legal professional to ensure accuracy and compliance with state laws.

Sign and notarize the document.

Store in a safe place and inform your executor or trusted person of its location.

Remember, this template is a starting point. Estate planning is a complex and personal process, and it's important to consult with legal and financial advisors to tailor your plan to your specific needs and goals.



NY ESTATE

LAW .AI EXCITEMENT

Interacting with AI at **NY Estate Law .**ai transforms the estate planning process into an exciting, innovative experience that's accessible to all New Yorkers. This cutting-edge technology personalizes your journey, making complex legal planning more affordable and manageable. By integrating AI, we're able to streamline the process, significantly reducing costs while ensuring you receive top-quality, customized estate plans. The value lies in the blend of advanced technology with real attorney expertise, making high-quality estate planning accessible to everyone, regardless of budget.

AT NY ESTATE LAW .AI,

CUSTOMER SATISFACTION IS 100% GUARANTEED

While this Estate Plan Template provides a solid foundation for your planning needs, estate planning is a complex process that requires personalized attention to ensure your specific circumstances are fully addressed. At **NY Estate Law .ai,** we offer two pre-selected estate planning packages designed to meet a variety of needs: the **Revocable Trust Package** and the **Irrevocable Trust Package.**

By using our proprietary AI systems available on our website, you can easily select the package that best suits your needs and save significant money through our AI Value offering—all while still having access to genuine attorneys. Our AI-driven process streamlines the planning experience, making it more efficient and affordable without sacrificing quality.

Customer Satisfaction is 100% guaranteed. Once you select one of our pre-selected packages, you will be matched with a genuine attorney who will thoroughly review your chosen plan with you, ensuring it's the perfect fit for your unique situation. If you find that the selected plan isn't the perfect fit, you can receive a full refund or apply the purchase price toward a custom estate plan. We will work with you until you are completely satisfied with your estate plan.

Visit NY Estate Law .ai today to explore our estate planning packages and take the next step toward securing your family's future with confidence.

DISCLAIMER

ATTORNEY MARKETING

Prior Results Do Not Guarantee Similar Outcomes.

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