# Estate Planning Examples:

## Options We’ll Show

How to Currently:

* Add Date of birth to contact
* Create and filter lists (children)
* Create nested repeats (grandchildren)
* Create a document showing addresses
* Create a related party – ie, the spouse of a client

To Come:

* How to Produce multiple documents
* How to use dynamic multiple select based on multiple starting point – client, spouse, children, other parties – to pull in information for various parties.
* Produce 2 wills with one set of entry data

## Sample True/False Paragraph

[**if** IsTaxPlanning]

Advanced Planning. In addition to the services described in Paragraphs 2.1. and 2.2., Attorney shall prepare for Client. Attorney shall also provide Client with appropriate tax identification numbers for any irrevocable trusts which will be funded immediately and will provide the trustee with a letter outlining the scope of responsibilities which the trustee must perform.

[**endif**]

## Sample If/Else based on selection

[**if** Plan​Type == “Will Only”]

You have chosen to only have a Will created for your estate.

[**elseif** Plan​Type == “Will, POA, Health POA”]

You have chosen to have a Will, POA, and Health POA

[**else**]

You have chosen to have a Will, Trust, POA, Health POA

[**endif**]

## Sample Use of Numbers – Spelling out and numeric

LEGAL FEES. Client will pay Attorney the sum of [Engagement​Fee|​format:​”cardinal”] dollars ($[Engagement​Fee|format:”0,0.00”])

## Sample Numbers – Show simple calculation - discount of fee

Your fee of [Engagement​Fee|format:”0,0.00”] will include a courtesy discount of [Discount​Percentage]%, which will make your total due at signing $[Engagement​Fee \* (100 - DiscountPercentage) / 100|format:”0,0.00”] (which rounds to $[Engagement​Fee \* (100 - DiscountPercentage) / 100|format:”0,0”].

## Date – spelled out – straight date – Different formats

This Agreement is made on [Engagement​Date|MM/DD/YYYY].

This agreement is made the [Engagement​Date| format:"Do [day of] MMMM, YYYY"].

This agreement is made in the [Engagement​Date| format:"MMMM YYYY"]

This agreement is made [Engagement​Date|M-D-YYYY].

## Date with age calculation

My Spouse’s age is [date.age(Spouse.​Birth​Date)]

## Sample use of Dynamic Multiple Choice

My trustee will be {[TrusteeName]}

## Multiple Selection of Dynamic Multiple Choice

My trustee will act in the following order John Smith and then Mary Jones (this could be multiple iterations)

## Pulling in appropriate address for a selection

My Trustees address is [Full​Address]

## Sample Inline List (Repeat) Change to listing children

My children [**list** Children|”1, 2, and 3”]{[FullName]}[**endlist**].

## Sample bullet List(Repeat)

Here are my children

* My Son Johnny Smith
* My Daughter Nancy Jones
* My Daughter Sally Smith who is a minor

## Sample List of Multiple Selection

Your plan will also include the following documents: Binder, Cover Letter, and Certificate of Trust

## Sample Nested List (Repeat) – in line

My children and their grandchildren are: Johnny Smith, with his children Jane Smith and Mary Smith; Nancy Jones, with her child Harry Jones; and Sally Smith, who has no children.

## Sample Nested List (Repeat) – Bullet point

Here are my children

* John Smith
  + Jane Smith
  + Mary Smith
* Nancy Jones
  + Harry Jones
* Sally Smith

## Sample Count of List

I have X children and Y grandchildren

## Sample Count of List with Filters

I have X children, of whom are X natural-born and X are stepchildren

## Sample Starting Paragraph

1. IDENTIFICATION OF PARTIES. This Agreement is made this [Engagement​Date], between [Law​Firm​Name| upper] (hereinafter referred to as "Attorney") and [ Client.​Full​Name| upper] [if Client.​Marital​Status.​Name!= “Single”] and [**endif**] (hereinafter [if Client.​Marital​Status.​Name!= “Single”] collectively [**endif**]referred to as "Client"). Attorney will provide legal services to Client as outlined in this Agreement.