Hot Docs Reminders

- Start with New Answer File
- Client questionnaire asks for middle name – Check with client whether they use their middle name before putting in document
- Tab after each entry
- Limit use of capital letters when describing relationships, ie. brother, sister etc. – not Brother, Sister
- Tax Provision – If beneficiaries of estate and employee benefit plans are the same, select option to pay death taxes on benefits from residue
- When finished answering questions select **Last** and program will tell you if you have any unanswered questions. When have no unanswered questions select **Finish**.
- After selecting **Finish** – choose SAVE AS – "name of client." Need to tab twice to get OK button
- Revisions can be made in MS Word by an Expert
- Health Care POA – Need to enter date of execution – does not bring over
- Asset POA is effective immediately – if client wants to delay effectiveness ask Expert for springing POA language

- Asset POA – Gifting Power choices:
  - Limited – only to spouse and kids and limited to $13,000, unless qualifies as medical or education
  - Expanded Limited – client defines who can receive limited gifts and can make unlimited gifts to spouse and charity
  - Broadest – to anyone (except Agent) for any amount
  - None

- Consult an Expert to review documents with client before they are signed
- Clients receive one will and three health care POA and three asset POA
- Complete and sign two termination letters for each appointment – Give one to client and we keep one