



An ITA Publication

ITA WILL & TRUST FORMS

2020 Edition

The Iowa Trust Association's popular Will and Trust Forms are now updated for 2020 by the law firm of Schiff Hardin Waite in Chicago. All orders include editable MSWord forms and printable PDFs with legal commentary for each form.

Don't pass up the chance at over 40 different Will, Trust and Estate and Charitable Planning Forms and commentary. Each form may be edited to meet your specific needs. The forms range from the very simple Will/Trust to the more complex forms. There are 125 different special powers and provisions that can be used to tailor the document to your client's situation. The added provisions range from farm manager designation clauses to the allocation of S corporation stock. See a complete list of forms and categories of special provisions on the back of this order form.

I would like to order the 2020 ITA Will & Trust Forms:

Will & Trust Forms including editable MSWord forms and printable legal commentary. Forms will be delivered electronically with an email link.

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Included forms

- Simple Will
- Will with contingent trusts for descendants
- Simple will with residue pouring over to inter vivos trust
- Simple pour-over will for unmarried testator
- Will with residue in family trust
- Will with QTIP marital deduction trust, family trust and outright distribution to descendants
- Will with QTIP marital deduction trust, family trust and trust for children
- Codicil to will
- Living trust agreement with all trust property distributed at settlor's death
- Living trust agreement with QTIP marital deduction trust, family trust and outright distribution to descendants
- Living trust agreement with QTIP marital deduction trust, disclaimer trust and outright distributions to descendants
- Living trust agreement with QTIP marital deduction trust, family trust and trust for children
- Living trust agreement with power of appointment marital trust, separate perpetual trusts for descendants
- Contingent life insurance trust
- Amendment to revocable trust agreement
- Minors trust agreement qualifying under Section 2503(c)
- Irrevocable gift trust with "Crummey" powers
- Irrevocable life insurance trust with "Crummey" powers
- Irrevocable perpetual life insurance trust for second-to-die policy
- Qualified Personal Residence Trust
- Grantor retained annuity trust
- Inter vivos two-life charitable remainder unitrust net income only
- Inter vivos charitable lead annuity trust
- Irrevocable perpetuities trust
- Lifetime QTIP trust
- Trust creating private foundation
- Limited partnership agreement
- Limited Partnership Agreement (Iowa)
- Buy-sell agreement
- Standby conservatorship petition
- Iowa durable general power of attorney for property
- Iowa durable power of attorney for health care
- Iowa living will declaration (rarely used in estate planning)
- Split dollar agreement
- Certification of trust
- Disclaimer
- Irrevocable perpetuities trust with division into separate trusts
- Irrevocable trust for grandchildren qualifying under Section 2642(c)
- Joint living trust agreement (small estate)
- Irrevocable health and education exclusion trust
- Living trust agreement for unmarried settlor, separate perpetual trusts for descendants
- Limited liability company operating agreement (Delaware)
- Short-form limited liability company operating agreement (Iowa)
- Limited liability company operating agreement (Iowa)
- Limited liability company operating agreement (Delaware, including nonvoting)
- Action to distribute trust principal in further trust
- Nonjudicial trust settlement agreement

Additional Will & Trust Provisions

- Will provisions
- Revocable trust provisions
- Living trust administrative provisions
- Marital trust funding and administrative provisions
- Trust distribution provisions
- Power of appointment clauses
- Contingent disposition provisions
- Tax clauses
- Trustee administration provisions and powers
- Irrevocable trust provisions and alternative forms