

## Estate Planning Experience Unknown

Volunteering for the Wills for Heroes program is relatively simple and straightforward, especially if you have some estate planning experience. The estate planning documents are assembled using HotDocs by LexisNexis, a very user-friendly document-assembly template platform. If you've never used HotDocs before, it takes only a few turns to get comfortable with its features. If you don't have a lot of estate planning experience, or if you want a refresher on the basics of estate planning, please review the "This is the Law" documents on the NCBA website for Living Wills and Healthcare Powers of Attorney (<http://www.ncbar.org/public/publications/pamphlets/livingWills06.pdf>) and Protecting Your Assets: Wills, Trusts, and Powers of Attorney (<http://www.ncbar.org/public/publications/pamphlets/protectingYourAssets06.pdf>). It is also recommended that you review the estate planning questionnaire as it provides a nice overview of the program.

The documents and information provided are designed for small or modest estates – the size of estates are capped at \$750,000. We do not provide advice or support on the following: beneficiary designations on any assets; estate, gift, income and/or Generation Skipping Transfer tax issues; special needs trusts; charitable trusts; citizenship/domicile of first responder and/or spouse; assets held outside of the U.S.; or any other complicated related issues.

Our program works like this. The first responder department coordinates appointments and the venue. The event is held in a large room - usually a department training room. Each first responder (and their spouse/partner) must complete an estate planning questionnaire in advance of the event. On the day of the event, a greeter signs in the first responders and has them execute a disclaimer. The first responder is then assigned to the next-available attorney. Each attorney has a laptop that is connected via a wireless network to a high-speed laser printer. You'll take the information from the estate planning questionnaire and input the information into HotDocs. We've designed the template to follow the same outline as the questionnaire. HotDocs automatically merges the first responder information with our WFH-developed estate planning forms. After the documents are assembled, you'll review the documents with the first responder. Once the documents are finalized, you'll pass the first responder on to a formal signing ceremony where the documents are signed, witnessed and notarized. Most folks are finished and notarized in an hour or less.

We usually have new volunteers shadow a more-experienced WFH volunteer attorney for at least one appointment just to make sure they are comfortable with the software. Of course, we never 'cut you loose' to see clients on your own until you're comfortable to do so. While we have done our best to keep the program relatively simple, we always have estate planning experts on hand at every event to answer any questions.

As you can see from the WFH web site, there are a number of opportunities to volunteer. Just email me and let me know where and when you'd like to volunteer and how many hours you can spare. The events start with our first appointments at 11 a.m. and our last appointments are at 5 p.m. Any time you have to volunteer is greatly appreciated.

I look forward to working with you at a WFH event. Again, thanks for volunteering!

## No Estate Planning Experience

Volunteering for the Wills for Heroes program is relatively simple and straightforward, even if you have no estate planning experience. In fact, you're in good company – other states have had over 150 different attorneys volunteer for this program and most of them are not estate planning attorneys. This program is designed, and the training materials are created, with this dynamic in mind.

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Usually new volunteers (especially those with little or no estate planning experience) shadow a more-experienced WFH volunteer attorney for as many appointments as necessary until they are comfortable with the software and the substance of the program. While we have done our best to keep the program relatively simple, we always have estate planning experts on hand at every event to answer any questions.

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## Experienced Estate Planner

Volunteering for the Wills for Heroes program is relatively simple and straightforward, especially if you're practice is estate planning or if you have some estate planning experience. Our estate planning documents were compiled by an estate planning expert using HotDocs by LexisNexis, a very user-friendly document-assembly template platform. If you've never used HotDocs before, it takes only a few turns to get comfortable with its features. It is recommended that you review the estate planning questionnaire as it provides a nice overview of the program.

Usually, first-time volunteers shadow a more-experienced WFH volunteer attorney for as many appointments as necessary until you are comfortable with the substance of the program and the software. This may not be necessary since you are an experienced estate planner. We also always have estate planning experts on hand at every event to answer any questions...please let me know if you'd also like to serve in this capacity as well.

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