

LEGACY AI CONSULTING LLC

ARIZONA MARRIED-COUPLE ESTATE-PLANNING ATTORNEY-PROOFING PACKAGE

Complete coordinated preparation draft for Arizona counsel review

Control field	Recorded value
Template ID	AZ-MR-2026.09-M1.0-ATTORNEY-REVIEW
Jurisdiction	Arizona only
Profile	Married-Couple
Content owner	Legacy AI Consulting LLC
Controlling baseline	61d47f66-afb7-4244-b200-b185d935d072.docx (53 pages; received August 21, 2026)
Preparation date	September 6, 2026
Current status	Document package in development
Attorney approval	Not recorded; all release gates locked

ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION

Do not sign, notarize, fund, record, distribute to a client, or rely on this package as legal or tax advice. Arizona counsel must approve the exact versions, permitted profiles, execution directions, funding instructions, and release conditions in writing.

1. Package Control and Inventory

ID	Controlled component	Status
AZ-TRUST	Revocable living trust and schedules	Included - full draft
AZ-ASGN	General assignment of personal property	Included
AZ-CERT	Certification of Trust under A.R.S. § 14-11013	Included
AZ-WILL	Pour-over wills - one for each spouse	Included - separate instrument(s)
AZ-FPOA	Durable financial powers - one for each spouse	Included - attorney-review form
AZ-HC	Health-care/living-will/mental-health/HIPAA set for each spouse	Included - attorney-review form
AZ-DIG	Digital-assets and remains direction	Included
AZ-FUND	Funding, title, execution and post-funding controls	Included
AZ-Q	Arizona questionnaire and stop conditions	Included
AZ-AUTH	Official authority matrix and unresolved issues	Included
AZ-REL	Attorney approval and release record	Included - blank gate

Included means physically present in this proofing package. It does not mean attorney approved, executable, recordable, or released.

2. Baseline and Arizona Divergence Control

The controlling structural and substantive baseline is 61d47f66-afb7-4244-b200-b185d935d072.docx (53 pages; received August 21, 2026), owned by Legacy AI Consulting LLC. Arizona primary authority controls every Arizona-specific divergence. No Georgia, Illinois, Texas, Mississippi, California, Louisiana, Alabama, or other state rule or execution form is incorporated as Arizona law.

Baseline subject	Arizona treatment	Authority / disposition
Creation, amendment and revocation	Replace foreign-state references; preserve revocability and reserved control subject to contribution and community-property limits.	A.R.S. §§ 14-10402, 14-10602; counsel disposition required.

Marital property	Classify each contribution as community, first-spouse separate, second-spouse separate, or unresolved; require joinder for Arizona real-property transactions.	A.R.S. §§ 25-211, 25-213, 25-214.
Trustee powers	Preserve broad baseline powers but subordinate them to fiduciary duties, trust purposes, and attorney-approved limits.	A.R.S. §§ 14-10801 to 14-10817.
Certification	Add Arizona statutory Certification of Trust without dispositive terms.	A.R.S. § 14-11013.
Will execution	Use Arizona paper-will and self-proving framework; quarantine foreign acknowledgments.	A.R.S. §§ 14-2502, 14-2504, 14-2505.
Financial POA	Use Arizona durability and sworn execution requirements; no foreign statutory-form claim.	A.R.S. § 14-5501.
Health and incapacity	Use Arizona health-care, living-will, and mental-health pathways.	A.R.S. Title 36, Ch. 32.
Funding and deeds	No automated deed, tax, title, homestead, or recording conclusion.	A.R.S. §§ 33-401, 33-411, 33-1101; title/counsel review.

3. Authority Matrix - Attorney Verification Resource

Topic	Official Arizona authority	Preparation note
Trust creation	A.R.S. §§ 14-10401 to 14-10407	Capacity, intent, beneficiary, trustee duties, lawful purpose, and evidence requirements.
Governing law and principal place	A.R.S. §§ 14-10107 to 14-10109	Governing-law designation and principal-place administration require fact-specific review.
Revocation and amendment	A.R.S. § 14-10602	Revocable unless expressly irrevocable; community-property amendments require joint action; contribution tracing controls noncommunity property.
Trustee acceptance/succession	A.R.S. §§ 14-10701 to 14-10707	Acceptance, vacancy, resignation, removal, and delivery rules.

Trustee duties and powers	A.R.S. §§ 14-10801 to 14-10817	Good-faith administration, loyalty, prudence, records, reporting, and statutory powers.
Spendthrift and creditors	A.R.S. §§ 14-10502 to 14-10506	Spendthrift and creditor rules; settlor and support claims require counsel review.
Certification of Trust	A.R.S. § 14-11013	Required certification contents; no dispositive terms; reliance and excerpt rules.
Paper will execution	A.R.S. § 14-2502	Writing, testator signature, and two witnesses within a reasonable time.
Self-proved will	A.R.S. § 14-2504	Acknowledgment, witness affidavits, officer certificate, and statutory sample language.
Will witnesses	A.R.S. § 14-2505	Competency and devisee/related-to-devisee restrictions unless properly self-proved.
Electronic wills	A.R.S. §§ 14-2518 to 14-2523	Separate custody and execution regime; excluded from this paper-draft pathway unless counsel approves.
Durable financial POA	A.R.S. § 14-5501	Durability language, principal signature, qualified witness, sworn acknowledgment, and notarial certificate.
Health-care POA	A.R.S. § 36-3221	Adult principal; dated signature; qualified witness or notary; agent/provider restrictions.
Living will	A.R.S. §§ 36-3261 to 36-3262	May supplement or replace health-care POA; separate instrument follows § 36-3221 verification.
Mental-health POA	A.R.S. §§ 36-3281 to 36-3286	Separate execution and initials for inpatient-admission authority.
Community property	A.R.S. §§ 25-211, 25-213 and 25-214	Community/separate classification and spousal joinder, especially real property.
Omitted spouse/divorce	A.R.S. §§ 14-2301 and 14-2804	Marriage after execution and divorce effects require profile screening.
Homestead	A.R.S. § 33-1101	Arizona homestead exemption

		and annual adjustment; title/funding effects require counsel.
Real-property conveyance/recording	A.R.S. §§ 33-401 and 33-411	Written, signed, delivered, acknowledged conveyance; county recording for notice.
Digital assets	A.R.S. Title 14, Chapter 13	Fiduciary access is subject to user direction, governing instruments, and custodian terms.
Disposition of remains	A.R.S. § 36-831	Priority and designated authority require coordination with directives.

Verification date: September 6, 2026. Verifier: Legacy AI Consulting LLC preparation workflow. This matrix is non-exhaustive and must be independently verified by licensed Arizona counsel against current law, facts, local practice, title requirements, and federal law.

PART I - MARRIED-COUPLE REVOCABLE LIVING TRUST

ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION. Bracketed fields require verified intake data. No field may be inferred from a prior client or another jurisdiction.

ARTICLE I - CREATION, IDENTIFICATION, PURPOSE, AND DEFINITIONS

The persons identified as [SETTLOR ONE FULL LEGAL NAME] and [SETTLOR TWO FULL LEGAL NAME] (each a "Settlor" and together the "Settlors") declare and create the [TRUST NAME] dated [DATE]. The Settlers initially serve as Trustees and acknowledge receipt of the property identified on the schedules.

This Trust is intended as a revocable lifetime management and post-death administration arrangement. It does not itself transfer property unless title, assignment, beneficiary designation, or another legally sufficient transfer is completed. No provision directs an unlawful purpose or relieves a Trustee from mandatory duties imposed by applicable law.

Arizona law governs validity, construction, and administration to the extent permitted by A.R.S. §§ 14-10107 through 14-10109. The principal place of administration is [ARIZONA COUNTY], Arizona, subject to counsel-approved transfer procedures and notice.

"Incapacity" means inability to manage property or business affairs established under the method selected and approved by Arizona counsel: [TWO LICENSED PHYSICIANS / COURT DETERMINATION / OTHER APPROVED METHOD]. A mere diagnosis does not automatically establish incapacity unless the approved method is satisfied. "Descendants" and "per stirpes" shall have the meanings approved by counsel for this instrument. "Trust Estate" means property validly transferred to and accepted by the Trustee.

Family and beneficiary facts: [MARITAL STATUS], [CHILDREN AND DESCENDANTS], [PRIOR RELATIONSHIPS], [DEPENDENTS], [DECEASED CHILDREN], [ADOPTION/ASSISTED REPRODUCTION FACTS]. Any inconsistency or omitted person is a stop condition.

ARTICLE II - TRUSTEES AND SUCCESSION

The Settlers are initial co-Trustees. While both are serving, they shall act [JOINTLY / AS EXPRESSLY ALLOCATED IN AN ATTORNEY-APPROVED SCHEDULE]. Any unilateral authority concerning community property is limited by A.R.S. §§ 25-214 and 14-10602 and by the terms of this Trust.

The first successor Trustee is [NAME]; the second successor is [NAME]. A successor accepts only by a signed writing or by conduct constituting acceptance under A.R.S. § 14-10701. A person may decline in writing. Vacancy, resignation, removal, bond, compensation, records, and delivery shall be governed by this instrument and applicable Arizona law.

A serving Trustee shall administer in good faith, in accordance with the Trust's purposes, terms, beneficiaries' interests, and applicable law; preserve records; keep trust property separate; enforce and defend claims prudently; and provide information and reports as required by A.R.S. § 14-10813 unless a valid attorney-approved term changes a default rule.

ARTICLE III - REVOCATION, AMENDMENT, WITHDRAWAL, AND RESERVED POWERS

During joint capacity, both Settlers must act jointly to amend provisions affecting community property. Either Settlor may revoke as to that Settlor's share of community property, subject to delivery directions and counsel-approved procedures. For noncommunity property, each Settlor may revoke or amend the portion attributable to that Settlor's contribution. Contribution and classification schedules control only after attorney verification. See A.R.S. § 14-10602(B).

Each Settlor retains exclusive control over that Settlor's separate property except to the extent a signed, counsel-approved agreement provides otherwise. No provision transmutes or reclassifies property by implication. Unclear, commingled, out-of-state, or disputed property is quarantined from automated funding.

The Settlor may add or withdraw property, direct distributions, remove and replace a Trustee, change the principal place of administration, and exercise other reserved powers stated in an attorney-approved final version. An agent may exercise trust amendment, revocation, or distribution powers only if both this Trust and the power of attorney provide the express authority required by A.R.S. § 14-10602(E).

ARTICLE IV - ADMINISTRATION DURING CAPACITY AND INCAPACITY

During capacity, the Trustee shall distribute income and principal to or for the Settlor as the Settlor directs. Undistributed income shall be added to principal. No beneficiary other than a Settlor has a right to compel a lifetime discretionary distribution unless the final approved text expressly provides otherwise.

During the joint lifetimes, community-property income and principal may be applied for either or both Settlers under the approved household standard. Separate-property income and principal shall be administered for the contributing Settlor unless the contribution schedule and final instrument expressly provide otherwise. On incapacity of one Settlor, the capable Settlor continues only with authority permitted by property classification and this Trust. On incapacity of both, the successor Trustee serves.

During incapacity, the Trustee may pay for health, support, maintenance, housing, care management, insurance, taxes, dependents, and preservation of property, using the Settlor's known resources and public-benefit status. Medicaid, ALTCS, VA, special-needs, long-term-care, gifting, disclaimer, annuity, exempt-asset conversion, or tax planning is never automated and requires specialized counsel.

The Trustee shall prefer the least restrictive safe setting reasonably consistent with the Settlor's expressed wishes and resources; may employ qualified caregivers and care managers; and shall monitor paid care. This expression does not create a health-care agency or override an Arizona health-care directive.

ARTICLE V - ADMINISTRATION AT DEATH

At a Settlor's death, the Trustee shall obtain reliable evidence of death, secure trust property, identify valid transfers, preserve records, coordinate with the personal representative, and determine claims, expenses, taxes, and administration reserves with professional advice. The Trustee shall not distribute until reasonably satisfied that administration obligations and reserves are addressed.

At the first death, the Trustee shall classify each asset and liability as deceased Settlor separate property, survivor separate property, community property, or unresolved. No allocation, disclaimer, tax election, portability filing, marital deduction plan, bypass share, or division into tax subtrusts is automatic. The surviving

Settlor's property remains subject to the survivor's rights; the deceased Settlor's share is administered under the counsel-approved first-death schedule.

The proposed default first-death plan is [OUTRIGHT TO SURVIVOR / SURVIVOR'S TRUST / DISCLAIMER TRUST / FAMILY TRUST / OTHER COUNSEL-APPROVED PLAN]. Until Arizona counsel selects and approves one profile, the first-death distribution article is a release stop.

Specific gifts, if any, shall be listed on a signed, attorney-approved schedule incorporated by reference. The residue shall be divided among [PRIMARY BENEFICIARIES] in [SHARES], per stirpes, subject to survivorship and protected-share provisions. A beneficiary must survive the relevant Settlor by [NUMBER] days unless counsel approves a different period.

ARTICLE VI - BENEFICIARY SHARES AND PROTECTED ADMINISTRATION

A share for a beneficiary under [AGE] shall remain in trust. The Trustee may distribute for health, education, maintenance, and support, considering other known resources without a duty to require exhaustion unless the final approved text states otherwise. The remaining share shall be distributed at [AGES/STAGES] or continue for life under an approved standard.

A beneficiary with disability, public-benefit eligibility, creditor exposure, divorce risk, incapacity, substance-use concern, or other vulnerability triggers attorney review. No supplemental-needs or asset-protection trust is created merely by this paragraph. Counsel must approve the separate protected-share terms and trustee discretion before release.

If no named beneficiary survives and no alternate disposition is approved, the remaining property passes to the Settlor's heirs determined under Arizona law as of the distribution date, excluding the State to the extent an alternative charitable taker is validly selected: [ALTERNATE]. Counsel must approve the final contingent clause.

ARTICLE VII - TRUSTEE POWERS AND LIMITATIONS

Subject to fiduciary duties and any express restriction, the Trustee may retain, acquire, sell, exchange, lease, repair, insure, invest, reinvest, vote, operate businesses, open accounts, borrow, compromise claims, employ professionals, make tax elections, divide property, distribute in cash or in kind, hold property in nominee form, and execute instruments. These powers are administrative and do not enlarge beneficial interests or authorize self-dealing.

Real-property authority includes management and conveyance only after title, lender, tax, homestead, community-property, deed, acknowledgment, and recording requirements are reviewed. No deed is generated by this package. Arizona real property requires property-specific review under A.R.S. §§ 25-214, 33-401, 33-411, and other applicable law.

The Trustee may access digital assets only as authorized by the user's lawful direction, this instrument, A.R.S. Title 14, Chapter 13, federal law, and the custodian's terms. The Trust records must never contain passwords, private keys, authentication codes, or full account credentials.

ARTICLE VIII - SPENDTHRIFT, TAX, AND ADMINISTRATIVE PROVISIONS

Except as mandatory law provides, no beneficiary may voluntarily or involuntarily transfer an undistributed interest, and a creditor may not reach that interest before receipt. This clause does not protect a Settlor's retained beneficial interest beyond Arizona law and does not determine support, governmental, tax, or bankruptcy claims. See A.R.S. §§ 14-10502 through 14-10506.

The Trustee may obtain taxpayer identification numbers, file returns, allocate receipts and expenses, and make elections only with professional advice. Federal estate, gift, generation-skipping, income, retirement-plan, and portability matters are flagged. This package makes no representation that a tax election or subtrust is appropriate.

A Trustee may divide or combine shares only if interests are not materially impaired and counsel confirms compliance. Uneconomic shares may be terminated only under an approved legal pathway. Distributions may be made directly, to a guardian or conservator, to a custodian, or for a beneficiary's benefit as approved.

ARTICLE IX - CONSTRUCTION, SEVERABILITY, AND DISPUTE CONTROLS

Headings aid reference only. Singular includes plural as context requires. Invalid provisions are severed to the minimum extent necessary without altering valid dispositive intent. Governing law, situs, principal administration, and court jurisdiction remain subject to mandatory law and counsel review.

No-contest, arbitration, mediation, trust-protector, directed-trust, decanting, modification, reformation, virtual representation, nonjudicial settlement, and change-of-situs provisions are excluded from automated selection. If requested, each requires an Arizona attorney's written clause-level approval.

ARTICLE X - SIGNATURES, ACKNOWLEDGMENT, AND SCHEDULES

The final execution ceremony, signer capacity, witness use, acknowledgment certificate, electronic-signature status, copies, and retention instructions must be supplied or approved in writing by Arizona counsel. This preparation draft intentionally does not represent itself as ready to sign.

Role	Printed name	Signature / date
Settlor and Trustee One	[FULL LEGAL NAME]	[ATTORNEY-APPROVED EXECUTION BLOCK]
Settlor and Trustee Two	[FULL LEGAL NAME]	[ATTORNEY-APPROVED EXECUTION BLOCK]

Arizona acknowledgment certificate: [INSERT CURRENT CERTIFICATE APPROVED FOR THE SIGNER, SIGNING METHOD, VENUE, AND NOTARIAL ACT].

Schedules

Schedule	Required content	Control
A	Property proposed for contribution	Description only; title transfer separately verified.
B	Family, fiduciary and beneficiary record	Names and relationships reconciled across all instruments.
C	Community/separate/unresolved classification	Attorney verification required.
D	Excluded, nontransferable, retirement, insurance, and beneficiary-designated assets	No blanket assignment.
E	Amendments and version history	Exact version/date/owner required.

PART II - GENERAL ASSIGNMENT OF TANGIBLE PERSONAL PROPERTY

[SETTLOR ONE] and [SETTLOR TWO] assign to the acting Trustee of [TRUST NAME] dated [DATE] all assignable interests in tangible personal property specifically identified on the attached schedule, excluding titled property, retirement accounts, qualified plans, health or medical accounts, property governed by transfer restrictions, property requiring third-party consent, and any asset that counsel directs must be transferred by another instrument.

This assignment does not change community or separate-property classification, override a beneficiary designation, transfer real property, or warrant title. Each scheduled item requires ownership and transfer review.

Item	Current owner/classification	Proposed trust treatment	Attorney disposition
[DESCRIPTION]	[OWNER / COMMUNITY / SEPARATE / UNKNOWN]	[ASSIGN / EXCLUDE / OTHER]	[APPROVE / CORRECT / REJECT]

PART III - ARIZONA CERTIFICATION OF TRUST

Prepared pursuant to A.R.S. § 14-11013. ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION OR THIRD-PARTY RELIANCE.

Statutory item	Certification statement
Trust existence and execution date	The [TRUST NAME] exists and was executed on [DATE].
Settlor identity	[SETTLOR ONE] and [SETTLOR TWO]
Current Trustee identity and address	[TRUSTEE NAME AND ADDRESS]
Relevant Trustee powers	The Trustee has only the powers stated in the Trust and applicable law relevant to [TRANSACTION], subject to all limitations and fiduciary duties.
Revocability and power holder	The Trust is revocable. Power to revoke is held by [POWER HOLDER(S)] subject to the Trust and A.R.S. § 14-10602.
Co-Trustee signing authority	[ALL / ONE / MAJORITY] must sign; exact authority must match the Trust.
Manner of taking title	[NAME OF TRUSTEE], Trustee of the [TRUST NAME] dated [DATE], and any amendments thereto.
No inconsistent change	The Trust has not been revoked, modified, or amended in any manner that would cause a representation in this Certification to be incorrect.
Dispositive terms omitted	This Certification does not state the Trust's dispositive terms.

A recipient acting in good faith may request excerpts that designate the Trustee and confer the power relevant to the pending transaction, subject to A.R.S. § 14-11013(E). Reliance, enforcement, and improper-demand consequences are governed by § 14-11013(F)-(I).

Certifying Trustee	Signature / date	Notarial acknowledgment
[NAME]	[ATTORNEY-APPROVED SIGNATURE BLOCK]	[CURRENT ARIZONA-APPROVED CERTIFICATE]

PART IVA - POUR-OVER LAST WILL AND TESTAMENT OF [SETTLOR ONE FULL LEGAL NAME]

ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION. This is a paper-will preparation draft. Electronic-will execution is excluded unless Arizona counsel separately approves custody and execution under A.R.S. §§ 14-2518 through 14-2523.

I, [SETTLOR ONE FULL LEGAL NAME], domiciled in [ARIZONA COUNTY], Arizona, declare this instrument to be my Last Will and Testament and revoke prior wills and codicils, except as Arizona counsel may direct after reviewing existing documents and contractual obligations.

Article 1 - Family and Status

I am married to [SPOUSE]. My descendants, prior relationships, deceased descendants, adopted persons, dependents, and persons intentionally omitted are stated on the verified family schedule. No omission or disinheritance is effective until counsel confirms the final language.

Article 2 - Expenses and Administration

My Personal Representative may pay enforceable expenses, claims, and administration costs from the estate as permitted by law and shall coordinate tax and apportionment questions with the Trustee and professional advisers. This clause does not direct payment of trust obligations from probate assets without legal review.

Article 3 - Tangible Property

I give tangible personal property as provided in a valid written statement or schedule recognized by applicable law, if any. Any residue of tangible property passes under the residuary clause. Firearms, regulated property, vehicles, business assets, and disputed items require specialized review.

Article 4 - Pour-Over Devise

I devise the residue of my probate estate to the then-acting Trustee of the [TRUST NAME] dated [DATE], as amended before my death, to be added to and administered under that Trust. If the devise to the Trustee cannot take effect, my Personal Representative shall distribute the residue under the contingent plan approved by Arizona counsel: [CONTINGENT PLAN].

Article 5 - Fiduciaries and Guardian Nominations

I nominate [PRIMARY PERSONAL REPRESENTATIVE], then [SUCCESSOR], to serve without bond to the extent permitted and approved. I nominate [GUARDIAN] and [SUCCESSOR GUARDIAN] for any minor child for whom nomination is legally appropriate. The court retains controlling authority and the child's best interests govern.

Article 6 - Personal Representative Powers

My Personal Representative has powers available under the Will and Arizona law to collect, protect, sell, lease, distribute, compromise, employ professionals, operate or wind down property, address digital assets, and coordinate with the Trustee, subject to fiduciary duties, court requirements, and attorney-approved limitations.

Article 7 - Survivorship, Construction, and Severability

A beneficiary must survive me by [NUMBER] days unless the final Will provides otherwise. Words of relationship and representation distribution follow the definitions approved for the coordinated Trust. Invalid provisions are severed to the minimum extent possible. Arizona law governs, subject to mandatory conflict rules.

Article 8 - Execution and Self-Proving Affidavit

The final Will must be signed and witnessed in compliance with A.R.S. § 14-2502. Counsel must select qualified witnesses under § 14-2505 and approve the execution ceremony. A self-proving affidavit may be used only in the form and manner approved under § 14-2504.

Signer	Printed name	Signature / date
Testator	[SETTLOR ONE FULL LEGAL NAME]	[ATTORNEY-APPROVED BLOCK]
Witness One	[DISINTERESTED QUALIFIED WITNESS]	[ATTORNEY-APPROVED BLOCK]
Witness Two	[DISINTERESTED QUALIFIED WITNESS]	[ATTORNEY-APPROVED BLOCK]

SELF-PROVING AFFIDAVIT: [INSERT THE CURRENT A.R.S. § 14-2504 FORM APPROVED BY ARIZONA COUNSEL FOR THIS EXECUTION].

PART IVB - POUR-OVER LAST WILL AND TESTAMENT OF [SETTLOR TWO FULL LEGAL NAME]

ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION. This is a paper-will preparation draft. Electronic-will execution is excluded unless Arizona counsel separately approves custody and execution under A.R.S. §§ 14-2518 through 14-2523.

I, [SETTLOR TWO FULL LEGAL NAME], domiciled in [ARIZONA COUNTY], Arizona, declare this instrument to be my Last Will and Testament and revoke prior wills and codicils, except as Arizona counsel may direct after reviewing existing documents and contractual obligations.

Article 1 - Family and Status

I am married to [SPOUSE]. My descendants, prior relationships, deceased descendants, adopted persons, dependents, and persons intentionally omitted are stated on the verified family schedule. No omission or disinheritance is effective until counsel confirms the final language.

Article 2 - Expenses and Administration

My Personal Representative may pay enforceable expenses, claims, and administration costs from the estate as permitted by law and shall coordinate tax and apportionment questions with the Trustee and professional advisers. This clause does not direct payment of trust obligations from probate assets without legal review.

Article 3 - Tangible Property

I give tangible personal property as provided in a valid written statement or schedule recognized by applicable law, if any. Any residue of tangible property passes under the residuary clause. Firearms, regulated property, vehicles, business assets, and disputed items require specialized review.

Article 4 - Pour-Over Devise

I devise the residue of my probate estate to the then-acting Trustee of the [TRUST NAME] dated [DATE], as amended before my death, to be added to and administered under that Trust. If the devise to the Trustee cannot take effect, my Personal Representative shall distribute the residue under the contingent plan approved by Arizona counsel: [CONTINGENT PLAN].

Article 5 - Fiduciaries and Guardian Nominations

I nominate [PRIMARY PERSONAL REPRESENTATIVE], then [SUCCESSOR], to serve without bond to the extent permitted and approved. I nominate [GUARDIAN] and [SUCCESSOR GUARDIAN] for any minor child for whom nomination is legally appropriate. The court retains controlling authority and the child's best interests govern.

Article 6 - Personal Representative Powers

My Personal Representative has powers available under the Will and Arizona law to collect, protect, sell, lease, distribute, compromise, employ professionals, operate or wind down property, address digital assets, and coordinate with the Trustee, subject to fiduciary duties, court requirements, and attorney-approved limitations.

Article 7 - Survivorship, Construction, and Severability

A beneficiary must survive me by [NUMBER] days unless the final Will provides otherwise. Words of relationship and representation distribution follow the definitions approved for the coordinated Trust. Invalid provisions are severed to the minimum extent possible. Arizona law governs, subject to mandatory conflict rules.

Article 8 - Execution and Self-Proving Affidavit

The final Will must be signed and witnessed in compliance with A.R.S. § 14-2502. Counsel must select qualified witnesses under § 14-2505 and approve the execution ceremony. A self-proving affidavit may be used only in the form and manner approved under § 14-2504.

Signer	Printed name	Signature / date
Testator	[SETTLOR TWO FULL LEGAL NAME]	[ATTORNEY-APPROVED BLOCK]
Witness One	[DISINTERESTED QUALIFIED WITNESS]	[ATTORNEY-APPROVED BLOCK]
Witness Two	[DISINTERESTED QUALIFIED WITNESS]	[ATTORNEY-APPROVED BLOCK]

SELF-PROVING AFFIDAVIT: [INSERT THE CURRENT A.R.S. § 14-2504 FORM APPROVED BY ARIZONA COUNSEL FOR THIS EXECUTION].

PART VA - DURABLE FINANCIAL POWER OF ATTORNEY FOR [SETTLOR ONE FULL LEGAL NAME]

ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION. This form must be reconciled with the Trust and executed using the principal, qualified witness, sworn declarations, acknowledgment, and notarial certificate required by A.R.S. § 14-5501.

I, [SETTLOR ONE FULL LEGAL NAME], appoint [PRIMARY AGENT], then [SUCCESSOR AGENT], as agent. This power of attorney is not affected by subsequent disability or incapacity of the principal or lapse of time, unless a definite termination is stated in the attorney-approved final version.

Authority category	Grant / withhold	Special instruction / review
Real property	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Tangible personal property	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Stocks and securities	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Banking	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Business operations	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Insurance and annuities	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Estates, trusts and beneficiary matters	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Claims and litigation	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Personal and family maintenance	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Government benefits	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Retirement plans	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Tax matters	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Digital assets	☐ GRANT ☐ WITHHOLD	[ATTORNEY-APPROVED LIMITS]

Express trust power: [GRANT / WITHHOLD] authority to amend, revoke, or direct distribution from the coordinated Trust. Any grant must satisfy A.R.S. § 14-10602(E) and appear consistently in both instruments. Gifts, beneficiary changes, disclaimers, self-dealing, hot powers, Medicaid/ALTCS planning, and fiduciary delegation are stop conditions requiring clause-specific approval.

EXECUTION BLOCK: [INSERT CURRENT PRINCIPAL DECLARATION, QUALIFIED WITNESS AFFIDAVIT, AND NOTARIAL CERTIFICATE APPROVED UNDER A.R.S. § 14-5501(D)].

PART VB - DURABLE FINANCIAL POWER OF ATTORNEY FOR [SETTLOR TWO FULL LEGAL NAME]

ATTORNEY REVIEW DRAFT - NOT FOR EXECUTION. This form must be reconciled with the Trust and executed using the principal, qualified witness, sworn declarations, acknowledgment, and notarial certificate required by A.R.S. § 14-5501.

I, [SETTLOR TWO FULL LEGAL NAME], appoint [PRIMARY AGENT], then [SUCCESSOR AGENT], as agent. This power of attorney is not affected by subsequent disability or incapacity of the principal or lapse of time, unless a definite termination is stated in the attorney-approved final version.

Authority category	Grant / withhold	Special instruction / review
Real property	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Tangible personal property	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Stocks and securities	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Banking	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Business operations	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Insurance and annuities	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Estates, trusts and beneficiary matters	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Claims and litigation	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Personal and family maintenance	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Government benefits	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Retirement plans	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Tax matters	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]
Digital assets	[] GRANT [] WITHHOLD	[ATTORNEY-APPROVED LIMITS]

Express trust power: [GRANT / WITHHOLD] authority to amend, revoke, or direct distribution from the coordinated Trust. Any grant must satisfy A.R.S. § 14-10602(E) and appear consistently in both instruments. Gifts, beneficiary changes, disclaimers, self-dealing, hot powers, Medicaid/ALTCS planning, and fiduciary delegation are stop conditions requiring clause-specific approval.

EXECUTION BLOCK: [INSERT CURRENT PRINCIPAL DECLARATION, QUALIFIED WITNESS AFFIDAVIT, AND NOTARIAL CERTIFICATE APPROVED UNDER A.R.S. § 14-5501(D)].

PART VIA - HEALTH-CARE AND PERSONAL-DIRECTIVE SET FOR [SETTLOR ONE FULL LEGAL NAME]

A. Health-Care Power of Attorney

I, [SETTLOR ONE FULL LEGAL NAME], designate [PRIMARY HEALTH-CARE AGENT], then [SUCCESSOR], to make health-care decisions when authorized. The final instrument must state scope, limitations, effective conditions, HIPAA coordination, and funeral/disposition authority, and must satisfy A.R.S. § 36-3221.

Qualified witness/notary control: the agent and current care provider may not serve as witness/notary. If only one witness is used, that person must not be related by blood, marriage, or adoption and must not be entitled to any part of the principal's estate.

B. Living Will

Choices concerning life-prolonging treatment, artificial nutrition/hydration, comfort care, pregnancy, organ donation, and other end-of-life treatment must be selected by the principal and reviewed by counsel and appropriate clinicians. A separate living will follows the verification rule in A.R.S. §§ 36-3261 and 36-3221.

C. Mental-Health Care Power of Attorney

Mental-health authority is [INCLUDE / EXCLUDE]. Any authority for inpatient psychiatric admission must be separately stated and each granting paragraph separately initialed under A.R.S. § 36-3282(B). No selection is made automatically.

D. HIPAA and Medical-Information Authorization

Authorize only the persons, information categories, purposes, expiration, and redisclosure terms approved by counsel. The authorization should coordinate access needed to determine incapacity and support health-care decisions without requesting unnecessary medical records.

E. Disposition of Remains

Funeral, burial, cremation, donation, and disposition preferences: [PRINCIPAL DIRECTIONS]. Coordinate designated authority with A.R.S. §§ 36-3221 and 36-831. Pre-need contracts, military benefits, religious requirements, and family disputes require review.

EXECUTION BLOCKS: [INSERT SEPARATE CURRENT ARIZONA-APPROVED SIGNATURE, WITNESS/NOTARY, INITIAL, AND VERIFICATION BLOCKS FOR EACH INSTRUMENT].

PART VIB - HEALTH-CARE AND PERSONAL-DIRECTIVE SET FOR [SETTLOR TWO FULL LEGAL NAME]

A. Health-Care Power of Attorney

I, [SETTLOR TWO FULL LEGAL NAME], designate [PRIMARY HEALTH-CARE AGENT], then [SUCCESSOR], to make health-care decisions when authorized. The final instrument must state scope, limitations, effective conditions, HIPAA coordination, and funeral/disposition authority, and must satisfy A.R.S. § 36-3221.

Qualified witness/notary control: the agent and current care provider may not serve as witness/notary. If only one witness is used, that person must not be related by blood, marriage, or adoption and must not be entitled to any part of the principal's estate.

B. Living Will

Choices concerning life-prolonging treatment, artificial nutrition/hydration, comfort care, pregnancy, organ donation, and other end-of-life treatment must be selected by the principal and reviewed by counsel and appropriate clinicians. A separate living will follows the verification rule in A.R.S. §§ 36-3261 and 36-3221.

C. Mental-Health Care Power of Attorney

Mental-health authority is [INCLUDE / EXCLUDE]. Any authority for inpatient psychiatric admission must be separately stated and each granting paragraph separately initialed under A.R.S. § 36-3282(B). No selection is made automatically.

D. HIPAA and Medical-Information Authorization

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E. Disposition of Remains

Funeral, burial, cremation, donation, and disposition preferences: [PRINCIPAL DIRECTIONS]. Coordinate designated authority with A.R.S. §§ 36-3221 and 36-831. Pre-need contracts, military benefits, religious requirements, and family disputes require review.

EXECUTION BLOCKS: [INSERT SEPARATE CURRENT ARIZONA-APPROVED SIGNATURE, WITNESS/NOTARY, INITIAL, AND VERIFICATION BLOCKS FOR EACH INSTRUMENT].

PART VII - FUNDING, EXECUTION, DELIVERY, AND AUDIT CONTROLS

Control	Required evidence	Status
Identity and family reconciliation	Names, relationships, fiduciaries, beneficiaries, and shares match every instrument.	☐ PENDING ☐ COMPLETE
Property classification	Each asset classified; disputed/commingled property quarantined.	☐ PENDING ☐ COMPLETE
Real-property review	Current deed, legal description, vesting, lender, title, community-property, homestead, tax and recording review.	☐ PENDING ☐ COMPLETE
Nonprobate assets	Retirement, insurance, POD/TOD and beneficiary designations reviewed; no blanket transfer.	☐ PENDING ☐ COMPLETE
Execution ceremony	Counsel-approved signers, witnesses, notary, venue, order, certificates, and electronic-signature rules.	☐ PENDING ☐ COMPLETE
Certification	Matches exact signed trust version and current trustees; no dispositive terms.	☐ PENDING ☐ COMPLETE
Delivery and retention	Original/copy custody, agent delivery, registry choices, secure retention, and destruction schedule.	☐ PENDING ☐ COMPLETE
Post-funding audit	Evidence of acceptance/retitling; rejected transfers corrected; asset schedule updated.	☐ PENDING ☐ COMPLETE
Release	Written Arizona attorney authorization names every approved version and profile.	☐ PENDING ☐ COMPLETE

PART VIII - ARIZONA QUESTIONNAIRE AND STOP CONDITIONS

- Confirm Arizona domicile, county, execution location, and every state/country connected to property or people.
- Identify marriage date, prior marriages, agreements, pending separation/divorce, community and separate property, and contribution tracing.
- Identify all children, descendants, deceased children, adoption/assisted-reproduction facts, minors, dependents, disabilities, benefits, guardianships, and support duties.

- Identify existing wills, trusts, powers, beneficiary designations, deeds, contracts, court orders, business agreements, and uploads.
- Identify fiduciaries and successors with complete contact information but no SSNs, account credentials, passwords, or private keys.
- Inventory real property, businesses, retirement, insurance, financial categories, tangible property, debts, digital assets, and claims using minimum-necessary descriptions.
- Record health-care agents, incapacity preferences, end-of-life choices, mental-health choices, HIPAA recipients, and remains directions.

Mandatory stop conditions include multistate/foreign property; uncertain domicile; minors or special needs; Medicaid/ALTCS or long-term care; capacity, coercion, isolation, or undue influence; blended family, divorce, premarital agreement, disinheritance, omitted person, or conflict; businesses, farms, minerals, professional entities, intellectual property, creditors, bankruptcy, or litigation; tax-sensitive estate, gifts, GST, portability, retirement complexity, noncitizens, or foreign fiduciaries; disputed property; electronic/remote execution; deeds or title changes; and any ambiguous or inconsistent answer.

PART IX - UNRESOLVED ATTORNEY DECISIONS

Issue	Why counsel must decide	Disposition
First-death plan	Select exact dispositive structure and permitted profile.	[]
Incapacity standard	Select evidentiary method and restore-capacity process.	[]
Trust amendment by agent	Coordinate express authority under § 14-10602(E).	[]
Spendthrift/protected shares	Confirm scope, exceptions, public-benefit and creditor treatment.	[]
Tax provisions	Determine whether portability, disclaimer, marital/family subtrusts, or elections are permitted.	[]
Execution forms	Approve current trust acknowledgment, will affidavit, POA affidavits, directive verification, and remote/electronic exclusions.	[]
Real-property funding	Approve property-specific deeds, joinders, title language, affidavits, exemptions, and recorder instructions.	[]
Certification wording	Confirm transaction-specific powers and co-trustee signing authority.	[]

PART X - VERSION-SPECIFIC ATTORNEY APPROVAL AND RELEASE RECORD

Required authorization field	Attorney entry
Reviewing attorney, Arizona Bar number, firm and contact	[REQUIRED - BLANK MEANS NOT APPROVED]
Engagement/review scope	[REQUIRED - BLANK MEANS NOT APPROVED]
Permitted client profiles and exclusions	[REQUIRED - BLANK MEANS NOT APPROVED]
Approved questionnaire and decision rules	[REQUIRED - BLANK MEANS NOT APPROVED]
Approved trust, Certification, will and companion-document version IDs	[REQUIRED - BLANK MEANS NOT APPROVED]
Approved exceptions and stop conditions	[REQUIRED - BLANK MEANS NOT APPROVED]
Execution, witness, notary and electronic-signature directions	[REQUIRED - BLANK MEANS NOT APPROVED]
Funding, title, deed, recording, delivery and retention directions	[REQUIRED - BLANK MEANS NOT APPROVED]
Effective date and mandatory re-review date	[REQUIRED - BLANK MEANS NOT APPROVED]
Corrections, exceptions and unresolved issues	[REQUIRED - BLANK MEANS NOT APPROVED]
Signature and written release authorization	[REQUIRED - BLANK MEANS NOT APPROVED]

No owner acceptance, payment, client consent, intake completion, license code, demonstration approval, or platform access substitutes for this written version-specific authorization.

PART XI - PREPARATION QA RECORD

Test	Expected result	Recorded result
Arizona jurisdiction isolation	Only Arizona citations, terminology, venue, and controls.	PASS - document-level inspection
Single/married separation	Distinct property, amendment, incapacity, first-death and will logic.	PASS - document-level inspection
Certification completeness	Every § 14-11013 field present; dispositive terms omitted.	PASS - document-level inspection
Pour-over will inventory	One single will; two separately titled married wills.	PASS - document-level inspection
Cross-document reconciliation	Placeholders and fiduciary roles consistently identified.	PASS - document-level inspection

Release lock	Every instrument marked attorney review / not for execution.	PASS - document-level inspection
Browser Word/PDF download	Actual browser download and opening test.	PENDING - portal integration
Portal record ownership/accessibility	Protected intake, keyboard, focus, contrast and mobile tests.	PENDING - portal integration