



Blue Seal Estate Planning Services Order Form

RETURN FORM TO SCHEDULING@BLUESEAL.US

Please fill out the form below to place an order for our **stand-alone services** or **service packages**. We offer customizable options for binders, Will covers, ribbon, and wax seals. Select the services and options that best suit your needs.

Rush Order: ☐ **Rush Order Required** ☐ **Document Recording Required** (Additional fees may apply)

1. Attorney Information: Current clients enter your Client ID here and proceed to Part 2. _____

Attorney Name: _____

Law Firm Name: _____

Email: _____

Phone Number: _____

Preferred Contact Method: Email / Phone / Other: _____

FOR OFFICE USE ONLY
LEAVE BLANK

2. Client Information:

Client Name(s): _____

Client Phone Number: _____ Best Time of Day to Call: _____

Client Email: _____ Physical Location: _____

3. Service Selection:

Please select from the following services or packages:

☐ **Stand-Alone Services:**

- ☐ Will Cover Customization: (Choose color options below)
- ☐ Will Tying with Ribbon and Wax Seal (Choose options below)
- ☐ Document Organization & Binder Assembly: Binder or Folder (Choose below)
- ☐ Remote Online Notarization (RON)

☐ **Standard Package:** Includes Notarization, Document Assembly, and Binder Creation.

☐ **Premium Package:** Includes Notarization, Document Assembly, Binder Creation, and Will Tying with Ribbon & Wax Seal.

4. Binder / Folder Selection: ☐ Binder **OR** ☐ Document Folder / Wallet **OR** ☐ None

5. Hole Punch: ☐ None ☐ 3-hole **OR** ☐ 2-hole
☐ Top **OR** ☐ Side

6. Will Cover Customization: ☐ Will Cover & Envelope Only **OR** ☐ Cover, Envelope, & Tying

7. Delivery & Shipping Information: ☐ In-Person Delivery (Available locally) **OR**
☐ FedEx/UPS Delivery (Signature required)

Account Information for Shipping:

FedEx Account Number: _____

UPS Account Number: _____

8. Provide any other details, instructions, point of contact for this order if different than attorney above:

Authorized Signature: _____ Title: _____

Print: _____ Date: _____

Customization Selections:

Will Cover and Envelope:

☐ White
☐ Off-White / Cream
☐ Dark Blue
☐ Deep Red
☐ Dark Green
☐ Purple
☐ Pink (Pastel)
☐ Pink (Bright)
☐ Yellow
☐ Orange
☐ Black
☐ Other _____

Binder:

☐ White
☐ Off-White / Cream
☐ Dark Blue
☐ Deep Red
☐ Dark Green
☐ Purple
☐ Pink (Pastel)
☐ Pink (Bright)
☐ Yellow
☐ Orange
☐ Black
☐ Other _____

Folder:

☐ White
☐ Off-White / Cream
☐ Dark Blue
☐ Deep Red
☐ Dark Green
☐ Purple
☐ Pink (Pastel)
☐ Pink (Bright)
☐ Yellow
☐ Orange
☐ Black
☐ Other _____

Wax:

☐ White
☐ Red
☐ Blue
☐ Black
☐ Dark Green
☐ Gold
☐ Other _____

Ribbon:

☐ Black
☐ Red
☐ Blue
☐ White
☐ Green
☐ Gold
☐ Other _____

Select tab divider titles to include in this order. Select the title box to include all tab divider titles listed in that heading. Up to 25 titles are included; additional titles will incur a nominal fee.

☐ **General Estate Planning Documents**

- ☐ Estate Planning Overview
- ☐ Letter of Instruction
- ☐ Estate Planning Questionnaire
- ☐ Important Contacts
- ☐ Personal Information
- ☐ Asset Inventory
- ☐ Funeral and Burial Instructions

☐ **Wills**

- ☐ Last Will and Testament
- ☐ Will Codicils
- ☐ Pour-Over Will

☐ **Trusts**

- ☐ Revocable Living Trust
- ☐ Irrevocable Trust
- ☐ Special Needs Trust
- ☐ Charitable Trust
- ☐ Testamentary Trust
- ☐ Trust Amendments
- ☐ Trust Funding Instructions

☐ **Powers of Attorney**

- ☐ General Power of Attorney
- ☐ Durable Power of Attorney
- ☐ Limited Power of Attorney
- ☐ Medical Power of Attorney
- ☐ Financial Power of Attorney

☐ **Healthcare Directives**

- ☐ Living Will
- ☐ Advance Healthcare Directive
- ☐ Healthcare Proxy
- ☐ Do Not Resuscitate (DNR) Order
- ☐ Physician Orders for Life-Sustaining Treatment (POLST)
- ☐ HIPAA Authorization

☐ **Real Estate Documents**

- ☐ Deeds
- ☐ Trust Transfer Deed
- ☐ Real Estate Ownership Summary

☐ **Financial Accounts**

- ☐ Bank Accounts
- ☐ Investment Accounts
- ☐ Retirement Accounts (IRA, 401k)
- ☐ Life Insurance Policies
- ☐ Annuities
- ☐ Business Ownership Interests

☐ **Personal Property**

- ☐ Personal Property Memorandum
- ☐ Vehicle Titles

☐ **Tax Documents**

- ☐ Gift Tax Returns
- ☐ Estate Tax Returns
- ☐ Tax ID Information

☐ **Guardianship**

- ☐ Guardianship for Minor Children
- ☐ Guardianship for Pets
- ☐ Guardianship for Dependents

☐ **Business Succession Planning**

- ☐ Business Succession Plan
- ☐ Operating Agreements
- ☐ Buy-Sell Agreements

☐ **Digital Assets**

- ☐ Digital Asset Instructions
- ☐ Social Media Accounts
- ☐ Online Accounts and Passwords

☐ **Miscellaneous**

- ☐ Letters to Loved Ones
- ☐ Philanthropic Goals
- ☐ Memorial Service Instructions
- ☐ Organ Donation Instruction