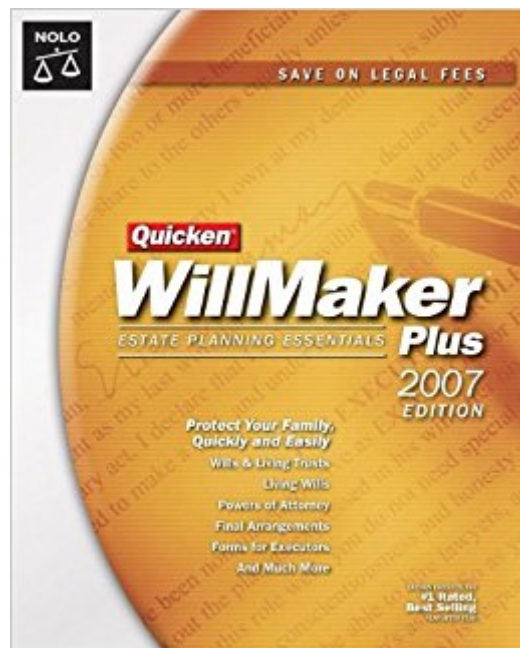




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# Quicken Willmaker Plus 2007 Edition: Estate Planning Essentials (Book With CD-ROM)



## Synopsis

America's No. 1 estate planning book with interactive CD-ROM software helps you create a will, living trust, living will -- and much more! Help protect your family and your assets, and save on legal fees! Quicken WillMaker Plus Estate Planning Essential 2007 Edition provides the legal forms you need. So comprehensive, the CD-ROM assembles your forms from among 40,000 document possibilities -- but so easy to use, you'll have them finished in minutes. NEW! Quicken WillMaker Plus Estate Planning Essential 2007 Edition now includes a full "health care power of attorney." Dictate the health care you wish to receive if you can't speak for yourself, and be assured that your loved ones won't have to second-guess themselves! Create your own: Will Living Trusts, including an AB Trust Health Care Directive: Living Will Health Care Power of Attorney (NEW) Financial Powers of Attorney Final arrangements document Important documents for executors The CD-ROM also provides forms you can use every day, such as authorizations and agreements, child and elder care forms, promissory notes and documents to help you repair your credit. For each document, Quicken WillMaker Plus Estate Planning Essentials 2007 Edition takes you through a step-by-step interview. Your documents will automatically reflect the laws of your state. If you have any questions, simply check out the comprehensive onscreen legal manual. Expert tech support is also available. Need to know more? Here are in-depth details about what you can do with Quicken WillMaker Plus Estate Planning Essentials 2007 Edition: Your Will Provide for family, friends and charities. Name a personal guardian to care for young children. Specify the executor (or "personal representative") of your estate. Select a trusted person to manage property left to young people. Revise and update your will whenever you like. Your Living Trust Make a basic trust, whether you're married or single. If married, you can create a AB trust (or bypass trust) and spare your heirs from potentially heavy estate taxes. Create subtrusts for minor children and young adults. Name custodians for property left to children. Change or revoke your trust at any time. Your Health Care Directive lets people who care for you make important decisions about your life and health when you can't. Create a: NEW! Health Care Power of Attorney Permit a loved one to make important medical decisions for you if you are unable to do so yourself. Living Will Specify whether you want your life prolonged through artificial means. Appoint someone to make sure your wishes are carried out. Your Financial Power of Attorney Name someone to make your financial decisions, in case you are medically incapacitated. Don't worry, you can grant as much authority as you wish. Your Final Arrangements Plan a funeral or other ceremony. Clarify whether you want a cremation or burial. Select someone to oversee your final arrangements -- and more! Documents for Your Executor Make sure your executor ("personal representative" in some states) has all the forms and

instructions he or she needs to do the job: Checklists, letters, notices, claim forms -- and more.

**Personal Finance Documents** Over a dozen forms that let you handle financial situations you might face on any given day, such as disputing a credit card charge, lending or borrowing money to friends or family, creating bills of sale -- and more!

**Home & Family Documents** Whether you need to authorize someone to travel with your child to another country, want to lend your car to a friend, or create an agreement with a trusted person to take care of your elderly parent, Quicken WillMaker Plus can handle all these family situations -- and many more!

Estate planning documents not valid in Louisiana.

## **Book Information**

Paperback: 539 pages

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Average Customer Review: 4.3 out of 5 stars 131 customer reviews

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## **Customer Reviews**

"By far the most comprehensive program we reviewed, offering guidance on everything..." -- USA Today

"From a group of tough critics, Nolo's WillMaker got the most praise... superior on every front." -- Kiplinger's Personal Finance Magazine

"More than worth the... price... easy to use and install." -- Black Enterprise

"Quicken WillMaker Plus... was easy to install from a CD, and we found the interview-style format intuitive. We found it the most complete of the five products we tried." -- The Wall Street Journal

"The difference: the software costs \$45; a lawyer typically charges \$500." -- Associated Press

**System Requirements** CD-ROM enclosed Computer: Pentium 133 (Pentium II 300 recommended)

Operating System: Windows 2000 / XP / Vista Memory: 32 MB RAM (64 MB RAM recommended)

Hard Disk Space: 19 MB (26 MB to install) Monitor: Super VGA (800x600) with 256 colors (16-bit

color recommended) CD-ROM drive: 2X Speed Internet Connection: 14.4 Kbps modem required to access online features (56 Kbps or higher recommended) Printer: Any printer supported by Windows 2000 / XP / Vista Software: Microsoft Internet Explorer 5.0 or higher. Adobe Acrobat Reader (optional). --This text refers to an out of print or unavailable edition of this title.

I originally wrote the following review for the Quicken WillMaker Plus 2007 software, which actually costs more than this book-CD-ROM bundle. This book-CD-ROM combo *\*DOES\** include the full version of Quicken WillMaker Plus 2007; see my picture posted above. I highly recommend this book-CD bundle as it's both cheaper and more helpful. The book is a very good primer on the topic of estate planning. Original review of the software, which mentions this Essentials kit: I'm a fan of Nolo's Quicken Willmaker product. It helps you create your own estate planning documents as well as a few simple general legal documents. It's very easy to use, and works in all states (except Louisiana, where the estate planning documents created in this software won't be legal due to that state's specific drafting requirements). There are a few things you should know, however, before purchasing the software. First, also sells a book-CD version called Quicken Willmaker Estate Planning Essentials which combines a full book on estate planning with a full version of the Willmaker Plus software, and it sells for much less than the software alone! It's just a much better deal. Just search for "willmaker" in the Book section. (Note: the 2007 version, which is the one you *\*should\** buy, is slated for release Oct. 30, according to the product page on .) Second, the 2007 edition of the software gives you updates and tech support through the end of 2007. While you can create and modify and print and export documents created in Willmaker 2007 for as long as you own the software, you won't receive any updates beyond December 2007. If your state's estate planning law changes in January 2008, for instance, your will and other Willmaker-created documents *\*might\** become outdated and no longer of legal value. Herein lies an interesting question, almost a catch-22: you bought this software to avoid the service of a lawyer, but in order to ascertain whether your documents will remain in legal force in the future, you may need to consult a lawyer! Of course, you can always opt to get the 2008 (and 2009 and 2010 and so on) versions. If Nolo continues to market the Estate Planning Essentials bundle for thirty bucks each year, you may still end up saving money upgrading each year rather going to a lawyer. (E.g., \$30 a year times 30 years comes to less than \$1000, cheaper than engaging a New York City or San Francisco lawyer for three hours!) My take: unless you live in a state that constantly alters its estate planning laws, you will probably be safe with just Willmaker 2007 and upgrade occasionally in the future, especially when your life situation experiences a big change. (For example, if you are married and, God forbid,

divorce in 2011, you can skip editions 2008-2010 but do upgrade to the 2011 edition when you re-plan your estate.) Third, while the software itself is easy to use with its step-by-step guide (and if you get the cheaper book version mentioned above, it's even better!), getting all the information you need about yourself (assets, beneficiaries, etc.) is actually quite a time-consuming process. That's why again I recommend the book-software bundle; it tells you what you need to do before running the software to write your will. Otherwise you'd be surprised at how much prep work you'll actually have to do before finishing even a simple will! One last thought: because this is self-help software, while many people will find it adequate, you may still want to talk to an estate attorney. For one thing, a legal will requires witnesses, and you might just as well pay your attorney and his assistant to act as your witnesses, if you don't want your friends or relatives to know what's in your will! For another, estate laws are getting more and more complicated, and vary by state, so a local attorney is still BY FAR the best and most reliable source and a competent attorney will provide invaluable services that no self-help software can offer. That said, I do recommend this excellent program (esp. the cheaper kit) for those obsessed with self-help and/or those looking to save money. (Yours truly belong to both types!) Besides, the Estate Planning Essential Kit, which I think is just GREAT, can educate you on the various topics in estate planning, so even if you choose to hire a lawyer, you'll talk smart and know what he or she is doing with your will and your trust. (Again, Louisiana residents should seek an attorney's help. This software, or any other estate planning software I know of, won't work in your state.) No adult with children or property is too young to start estate planning. However you choose to proceed, good luck! [Disclaimer: This review, originally written Sept. 18, 2006, was updated on Oct. 9 after a Nolo representative e-mailed me about my misunderstanding of the software's update/upgrade policy. Also, please note that I'm \*not\* a lawyer (not even a law student!) and cannot offer any legal advice; please do not e-mail me with your legal questions.]

Since the more comprehensive reviewers here have already covered the features of Willmaker Plus 2007, I will only add a little opinion and a heap of praise to Quicken, for teaming up with Nolo in making this incredibly easy to use yet powerful program. I must admit that I am not the sharpest tool in the shed, but I was able to create a simple Will without even opening the book because of the very easy to use step by step format. Legal jargon is explained brilliantly in layman's terms. This program is truly idiot proof! Wills, Powers of Attorney for health care & finances along with other legal documents are the most important yet often neglected documents a person must deal with in life. Becoming incapacitated or dying without these documents in place can leave your loved ones with a real legal nightmare. Completing my Will & Powers of Attorney and putting all of my important

papers like deeds, titles, financial statements and insurance policies, in one place (known to loved ones) has given me tremendous peace of mind in knowing that my loved ones will have a much easier time resolving all of the legal matters if I become incapacitated or when I die.

Few obsess, or even like to think about their own death. But it will happen, and generally not at a time of our own choosing. So why leave a legal mess for your family to clean up when you can spend thirty bucks and change for this software, and in less than an hour bang out a serviceable will? The software is interview-based, tailored to your State law, has a full range of forms and considerations, and is user-friendly. This small expenditure can save your heirs the cost and delays of probate court, and put your estate in the hands of an executor of your choice rather than one appointed by the court. And the exercise of making your will is a remarkable starting point for contemplation of the fleeting nature of life, and what you value in life. At least it was for me - and, full disclosure, I am not a lawyer, so I am blissfully ignorant of any of the software's flaws in this regard. A final note - buy the book+software combo - it's cheaper than the software alone. And live long and prosper.

After looking at all possible options for creating wills for my husband and myself, I decided to give Willmaker a try. I'm very happy I did! The software not only gives you options, but also suggestions as to where to begin, and what is most important to people at the same age and status in life. While you are filling out the forms, each page has concise definitions and explanations for all options on the right of the page. Making informed choices is easy and effortless. My mother just revised her will, using a lawyer. The process was tedious and time consuming. Her resulting will and other documents are remarkably similar to mine. Her cost \$1200.00. Using Willmaker, my husband and I created all the required documents in a few evenings, and took them to our bank for a notary and witness signatures. Our cost, under \$40. A perfect solution to a stressful and necessary task.

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