

WILLS FOR HEROES DISCLAIMER

The Louisiana State Bar Association Young Lawyers Section Wills for Heroes (“WFH”) program is available to assist Veterans and their spouses or partners only. WFH provides simple Wills, Living Wills, and Health Care and Financial Powers of Attorney to eligible members of the Veteran community. The documents and information that will be provided by WFH volunteers are designed for small or modest estates and the information provided by WFH volunteers is general in nature. To avoid conflicts relating to joint representation, each Veteran and his or her spouse or domestic partner must complete a separate questionnaire and each person will have an appointment with a separate lawyer. Large estates, or complicated legal matters pertaining to modest estates that require more time and assistance than can be provided by the WFH summary services, are not covered under the WFH program and should be handled by more experienced estate, tax and probate lawyers. The determination of whether an estate is too large or complicated and thus outside the scope of the program is to be made in the sole discretion of WFH. WFH reserves the right to refuse this service to anyone.

The following issues are beyond the scope of the WFH program; therefore, neither WFH nor WFH volunteers intend to provide any legal advice in these areas:

1. Beneficiary designations on any assets;
2. Estate, gift, income and/or Generation Skipping Transfer tax issues;
3. Special needs trusts;
4. Charitable trusts;
5. Citizenship/domicile of first responder and/or spouse;
6. Business ownership or family business holdings;
7. Assets held outside of the United States of America; and
8. Any other issues which are deemed by any volunteer as more complicated, difficult, or will require significant time and expertise beyond the scope of this program.

All information will be kept confidential and is for the sole use of the WFH program. The lawyers you will see are provided for the sole purpose of drafting and providing these simple estate planning documents at no cost. In addition, no attorney-client relationship or other professional relationship of any nature whatsoever will be deemed to have been created by your participation in WFH.

Your signature below acknowledges that you are aware that no lawyer or law firm involved in WFH has performed a conflict search on your name. If you are aware or become aware of any potential conflicts at the time of your meeting with these volunteers you further acknowledge that it is your obligation to inform them of the potential conflict at that time.

Your signature also acknowledges that your documents will be prepared by WFH volunteers in reliance upon the information provided by you in your estate planning questionnaire and during your meeting with a WFH volunteer lawyer to prepare your legal documents. It is your sole responsibility to accurately and completely answer all questions in the estate planning questionnaire and to provide accurate and complete information to WFH volunteers. Failure to do so could result in documents that do not adequately address your estate planning needs.

Finally, your signature below is an acknowledgement that you understand that the State Bar of Louisiana does not offer or provide legal advice.

_____ I understand and agree that, to the extent that any attorney-client relationship may have
(Initials) formed, it ends once my estate planning documents are signed, witnessed, and notarized.

Signature

Date

Printed Name