

PAPER FOR ESTATE PLANNING DOCS

At my office, we use regular copy paper for pretty much everything. I am considering purchasing some higher quality paper for original wills/PoAs/trusts etc. We also use blueback style covers for all of these documents.

Does anyone use "nice" paper for wills and such? If so, can you send me a link or description of what you prefer?

I know I could go to Staples and ask the clerk to let me feel samples the different stocks, but I HATE shopping.

Thanks!

28lb or 30lb bond

David Masters, Colorado

Southworth by Keenan, white, 20#. It is also watermarked to increase the challenges facing a potential forger. We get it through Staples.

Deb Matthews, Virginia

I generally use 24lb. paper from Hammermill. If you want higher quality, you need some cotton content, but it gets pricey.

Carla Peevey, Texas

I, too, use 24# paper, but with 100% cotton content, Crane's Crest Fluorescent White, I think it's called. It's Crane stationary, and it goes along with the engraved Crane's stationary I use for letters. I purchase from BurdgeCooper (formerly known as Stuart F. Cooper) <http://www.burdgecooper.com/>. Engraved stationary seemed to be much less through them, than elsewhere, when I first bought. I've been pleased since (no, I don't get anything for the referral; I'm just a happy customer).

Yes, the Crane's, as I buy it, is pricey. My clients seem to appreciate it.

The choice of the heavy (24# and 100% cotton) paper was chosen due to my years as an oil and gas abstracter. In Louisiana, the original documents are maintained by the Clerk of Court. After much use by abstracters and others, the original documents tend to tear if acts and other filings are on "copy" paper. So, I chose the heavier paper to be sure anyone coming behind me, reviewing a succession (probate) matter, or another original document recorded in the Conveyance or Mortgage Records, would find the documents to be in one piece, years from now.

Mark E. Peneguy, Louisiana

We have used Southworth fine papers for decades. Search under 'Southworth paper' and their products will display.

Southworth 403CR is red-ruled white, water-marked, bond, 20 lb., 25% cotton fiber, which we use for some pleadings, powers of attorney, and the like. I rarely see it 'around.' I have observed court staff make spontaneous favorable comments about the appearance of the documents on red-ruled paper.

Southworth 13C is white, water-marked bond, 20 lb., 100% cotton fiber. We use this for correspondence. The computer applies our logo and address and phone information.

Southworth ____ (I do not have a box handy to look for its number) is white, watermarked bond, 20 lb., 25% cotton fiber. This is our workaday business paper, not plain copy paper.

Will paper and will manuscript covers. We have ordered Blumberg Law Products for years. They have water-marked, bond 'will paper' and will covers with optional engraving. I think we receive catalogs in the mail and assume they have their selections online. Blumberg has an excellent selection of products.

We have not done this but I think you can order bond paper with your custom water-mark. Also, WordPerfect will do this; I assume Word will. That is, you can apply your own 'water-mark,' which is just a light printed impression.

We also buy bulk blue backs which have no imprint, and which we have found we cannot imprint in-house. I have not checked if imprinted blue backs are 'out there.' Anyone know?

Copy paper. We just buy whatever is on sale.

Labels. You can buy various sizes of blank labels which go through printers like a breeze. I think WordPerfect has presets for various labels. Not sure about Word. We use those to print firm logo-bearing labels for large envelopes.

Various sizes of envelopes. Office supply stores have various sizes of tan envelopes. We keep a variety on hand. We can either run some envelopes through a laser printer or with large one we apply the previously mentioned labels.

And not to forget, we have a real typewriter which comes in handy on occasion, particularly with labels.

Rob V. Robertson, Texas

Wow, I use regular copy paper for everything. No special covers or backs either.

David Shulman

I always tell my clients that one of the reasons I'm less expensive is that I don't do fancy. I've never known a hospital or bank to give a flying flip. And in our courts, judges usually get certified photocopies from the clerk, so unless there's a reason for them to send for the original, most judges never see it.

Mego Tebo, Illinois

I use regular copy paper, because my trusts tend to be 28-60 pages long, and heavier paper just makes them TOO thick. Also, when my assistant has to scan in someone's older documents (for example, if they are amending an older trust, we usually scan their documents as a courtesy so they will have PDF copies of everything), she hates it if the paper is heavy, as it tends to jam on the copier/scanner.

I have considered using a better-quality paper, but I don't want anything heavier than 20-lb. because of the thickness. Just haven't had time to shop. Also, I do use a LOT of it so it would be expensive, and it would necessitate the staff substituting the "fancy" paper in one of the copier trays (now, one is regular paper and the other is letterhead, which is on heavier paper that I get from Vistaprint) every time we were to do original documents (at least 6 times/week).

I also use Avery 'Heavy Duty' white view binders, rather than those (in-my-view-over-the-top) heavy padded ones that some estate planners use. People seem to like them and there's room for them to put all sorts of other useful items (such as deeds, car titles, IRA and bank account statements or at least beneficiary designation confirmations, lists of passwords, etc.), I even provide tabs for that stuff to encourage them to fill up (and periodically review) the binder. I think the less "formal" notebook tends to project more of a "working document" feel, rather than the "OMG this is important stuff that I'd better not mess with" feel of the more common EP binders.

Cynthia Hannah-White, Hawaii

Southworth 24# business 25% cotton paper.
That's as nice as it gets in my office.
I have a comb binding system for trusts.
Wills and POA's go into a blue folder with my business card inside.

P. Jayson Thibodaux, Washington

Yup, Southworth 24# business 25% cotton paper for me too.

Naomi C. Fujimoto, Hawaii

Wow - I'm with Dave S we just use regular copy paper too. (Perhaps I need to up my game!) But we do blue back the originals. I make extra copies of the health care doc for doctor and agent

For new trusts, we continue to put a set of copies of all docs in a nice binder. It makes a good place to keep all related info like insurance policies too. They are expensive but clients really appreciate them

One thing I have started recently for clients that don't have a trust but get a Will and/or POAs, is using clear plastic envelope with a nice cover page that is also a table of contents for one set of copies, numbered tabs between the docs. And my contact info, business card etc. All originals go in a plain envelope labeled originals for the safe deposit box.

Lisa M. Knauf, Illinois

I originally used 100% cotton or good 25% cotton bond paper for wills and trusts. I also used Blumberg Will backs and Blumberg Will envelopes.

The will backs I always had to trim the side a tiny bit to fit thru laser printer. The printer would groan when I fed them, and it would really groan when I fed the envelopes thru.

And the heavy paper was, frankly, thick, and tough to trifold; and over the years when I got them returned to me for probate I noticed that the print wore off on the fold lines; it was readable but sloppy. I staple everything.

I don't like, in fact I hate three hole binders for estate docs; clients lose papers out of there, they're always taking stuff in and out, the holes get worn out, I just despise them. Well, what with the thickness of the bond paper and the print flaking off, and the fact that my printer really didn't like the will envelopes, plus that I couldn't use will envelopes for any other docs, I now use standard copy paper; prints fine, doesn't 'flake' off, and use Budco Bank Bags for the documents; they're big enough to hold 2 wills, 2 POA, 2 HCS, 2 Living wills (for a couple) plus I can use them for deeds, mortgages, trusts, and any other docs I generate for clients. Clients like them and they're relatively cheap if I buy them by the case. Imprinted with name, address, phone, website and email address.

<https://budcobank.com/AWSCategories/c/3006325/Zipper-Wallet-Bank-Bags>

Ronald Jones, Florida

We gave up on the blue backs years ago. We use the best two-pocket portfolios that OfficeDepot has. They hold, as Ronald says, two wills, two MDPOAs, and two POAs.

David Masters

+1 on the bank bags. I remember a few years ago when I last saw Ron post about the bank bags and I ordered a stack of them with my information on them. My clients all appreciate the ability to have the zippered bag, with the info on it, and they often even tell me they know just where in their house they will put it. I think I even

got a referral or two out of them from people who said they saw the bag at so-and-so's house and realized they needed an estate plan.

Andrew M. Ayhers, New York

Interesting idea, as I normally just provide clients with their documents in a large envelope: what specific bag do you use?

Michael A. Koenecke, Texas

Personally, I use the 11X6 leatherette in either a navy or powder blue; imprinted with name, attorney at law and as much contact info as I can fit on it.

<https://budcobank.com/AWSCategories/p/454/Leatherette-Zipper-Wallet-Bank-Bags>

There's a big price break at 100 bags; almost \$2 a bag less, so it makes sense to order 100 at a time.

Some people like the nylon ones, which are a bit cheaper, particularly if you don't get 100:

<https://budcobank.com/AWSCategories/p/456/Laminated-Nylon-Zipper-Wallet-Bank-Bags>

whatever you like.

I trifold the docs to fit in it; but if you don't like that idea they make bigger bags that will hold 8X11 document unfolded

<https://budcobank.com/AWSCategories/p/2587016/Leatherette-Portfolio-Zipper-Wallet-Bags>

Clients love them and as Andrew notes, clients know exactly where it is; it stands out. More to the point, client's children see it almost immediately; it stands out from loose leaf binders and manila folders and Kraft envelopes and stuff like that. And it screams "Call this Lawyer" .

Banks used to give these things out 60 years ago and people used them; my parents had one dating from 1960 when they closed on their mortgage and all of their really important papers were in it for years; it was just the place where you put birth certificates, deeds, marriage licenses, life insurance policies, etc. And my clients still do that. When kids come in to my office after parents die, they got the bag, open it, there's the will, the power of attorney, oh, lookit, there's life insurance policy, title certificate to cars, marriage license, deed to the house, spare social security card. It makes it easy on everyone because clients will use them.

Ronald Jones

And, because it just seems appropriate:

http://www.americanbar.org/groups/gpsolo/resources/solosez/popular_threads_2011/082211thread5.html. It's the Rick Rutledge will tying primer at <https://www.youtube.com/watch?v=OPZi0mRxXiM>

jennifer j. rose, Mexico

Wow, just wow! Rick is my hero.

Tammy Ann Smith Heffernan, Vermont

I have clearly adopted Ronald's system. I use the same bag in navy with white lettering. I dug deep into my archives and found my first order from about 4 years ago when I started out with an order of 10 for about \$3 each just to test them out and haven't looked back since.

Andrew M. Ayers

I don't use binders because a lot of my clients put their documents in safe deposit boxes and the binders don't fit.

Naomi C. Fujimoto

Ron's email makes me want to print documents just so that I can give them to my clients ;) [As a tech law guy, I can count the number of times I've actually printed documents to give to clients on one hand.]

As a substitute for regularly buying more expensive/less scannable paper, consider a one-time purchase of Matthew Butterick's "Typography for Lawyers"
<<https://www.amazon.com/Typography-Lawyers-2nd-Matthew-Butterick/dp/159839262X>>

and one or two good fonts. Use of the book and better fonts will improve the presentation of all your documents, printed and on-screen, and clients notice this even when they can't put their finger on why. (I like to think it is my good plain-English drafting skills, but the typography really does help...)

Luis Villa

What fonts do you like?

David A. Rubin, Missouri

I primarily use Butterick's Equity for my own documents and business cards:
<http://practicaltypography.com/equity.html>

When working in Google Docs (fairly common for me), I use Merriweather for titles, headings, and slides; it can also be downloaded for day-to-day use in Word:
<https://www.fontsquirrel.com/fonts/merriweather>

I've never found a Google Docs body font that I love; mostly I use Cambria for body text in that situation.

Butterick's website has a nice list of alternative fonts that lets you compare a bunch of things at once, with the default fonts you may typically use:

<http://practicaltypography.com/font-recommendations.html#links>

Luis Villa

I've seen you post about your bags before. I remember looking at them.

I ordered me some today. It is a cool thing and not that expensive.

I always worry about presentation and how my wills look - when folks come in and bring me the blue backed ones and some other fancy ones.

P. Jayson Thibodaux

Yeah, and I get it about the presentation; many, probably most, lawyers still use will backs and will envelopes; though it's tough to tell as wills tend to have a long tail and most of the wills given to me for probate were done in the last century. I do agree that will backed wills look nicer; but I'm not sure it makes a bit of difference to the client, and given Florida Efiling, where we scan documents in and upload them, you can't do that with a will backed will without disassembling it (and Rick Rutledge's will tying, while wonderful, man I would not want to try to scan a will with sealing wax on it).

There's work arounds, copying will then scanning the copy but I just made a decision, no will backs, no will envelopes, just use a standard paper cover, and give the client the document(s) in a bank bag. It's straightforward, and given the number of wills I do it really saves me a bunch of time when printing out a half a dozen wills for a will signing; I'm not screwing around trimming the will cover, feeding it, feeding the will envelope.

Ronald Jones

Replying mostly to Ron's over-sized will cover dilemma: my supplier www.jameswilliams.com has a will cover that fits as-is in the printer (they have a letter size and a laser size, in addition to legal). I think I get the laser size; I can print the client's name right on the cover from a template I have already set up.

Will paper is from the same company, Gilbert Bond 25% cotton. Simple.

YMMV.

Lisa B. Collins, Pennsylvania

We do still use white marbled backings and white marbled envelopes for original wills. We also have special engraved first pages that we use but will be phasing out once we run out of our current supply. Those are Blackstone No. 08-3155SO. Sorry, don't know the part number for the "Will" envelopes and "Last Will and Testament" backings, I can't find them anywhere in the closet, but I'm pretty sure they are also from Blackstone Legal, and are white with marbling. At one point in time I was using heavier paper for other pages, but frankly I usually use just regular paper for that. Technically with Florida courts we were supposed to change to a certain percentage recycled content years ago for anything sent to the courts, which I would guess would include wills.

I also have bankers bags, and often put trusts in those - that is really the client's choice. We usually blueback trusts. Many of mine prefer them in paper envelopes (we order top closing envelopes and just print out "Valuable documents" and some other information, as well as our firm contact information on that).

As far as oversize envelopes - those are really popular among my clientele. Wider than most envelope feeders, but not huge, so that one can easily slip a trifolded document into it and it still fit into the smallest safe deposit box. Our solution is that we just bought a printer to accommodate these weird sized and heavier paper. It is an Epson Workforce WF-7110. Almost everyone else has a Brother printer, but one of my assistants uses this.

Cynthia V. Hall, Florida

I decided to use linen paper once, thinking it was fancy and a lovely finished product. Mistake. The notary's seal would not imprint easily, copying/scanning was a problem because more than one page was gripped at a time often and re-prints become potentially costlier. Regular white paper I use for everything else works best.

Elizabeth C.A. Johnson, California
