

# Leimberg Information Services, Inc.

## Steve Leimberg's Estate Planning Email Newsletter - Archive Message #2794

**Date:** 11-May-20

**From:** Steve Leimberg's Estate Planning Newsletter

**Subject:** [Martin M. Shenkman, Jonathan Blattmachr, Andrew Wolfe & Thomas A. Tietz on the Slow Return to the New Normal and Different Approaches to Signing/Executing Estate Planning Documents](#)

*“The current COVID-19 pandemic has made it more important than ever for individuals to establish (or update) their core estate planning documents. Before COVID-19, the client would simply visit an attorney’s office in order to sign core documents under the attorney’s supervision and with the lawyer providing the witnesses and/or a notary public. In many instances, attorneys would have two witnesses and a notary on all documents, because it would meet most, if not all, state statutory requirements to sign the various documents and it was easy to do so.*

*However, the current situation is anything but normal, with the COVID-19 pandemic requiring social distancing, sheltering-in-place and an associated lockdown of non-essential businesses. Even as restrictions are beginning to lift, clients who are older or have underlying health conditions may continue to be concerned about close contact that in the past had been taken for granted as part of any estate planning signing ceremony.*

*This newsletter will provide an overview of different approaches to signing documents that various practitioners have considered or used in the current environment. In addition, a discussion of some of the general concepts of state law requirements for the valid execution of these core documents will be provided. Several checklists and samples will be provided to assist practitioners. Finally, a summary of the laws in several states prepared by practitioners in those jurisdictions will be provided. It is hoped that the general and various state discussions, and sample documentation, will be a practical aid to practitioners dealing with these challenging times.”*

**Marty Shenkman, Jonathan Blattmachr, Andrew Wolfe and Tom Tietz** provide **LISI** members with helpful commentary that provides an overview of the different approaches to signing documents that various practitioners have considered or used in the current environment. In addition, a discussion of some of the general concepts of state law requirements for the valid execution of these core documents is provided. Several checklists and samples are included to assist practitioners. Finally, a summary of the laws in several states was prepared by the leading practitioners in those jurisdictions. It is hoped that the general and various state discussions, and sample documentation, will be a practical aid to practitioners dealing with these challenging times. If you would like to submit a summary for a state that has not been included above please email [shenkman@shenkmanlaw.com](mailto:shenkman@shenkmanlaw.com) and we will update this newsletter.

Their commentary can be found at this link: [Different Approaches to Signing/Executing Estate Planning Documents](#)

**HOPE THIS HELPS YOU HELP OTHERS MAKE A POSITIVE DIFFERENCE!**

*Martin M. Shenkman*  
*Jonathan Blattmachr*  
*Andrew Wolfe*  
*Thomas A. Tietz*

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