

Vincora

Making estate planning documents usable in practice

Joel Ward | Company case study

I developed and directed work for Vincora that makes estate planning easier to understand and follow through. The selected work includes an extensive estate planning guide, a power-of-attorney execution guide, an observation form, and a national research framework. Together they show how detailed subject matter can become navigable guidance, practical records, and development tools.

The practical problem

A long document can leave users unsure what happens next: what information to gather, how to record choices, which supporting records to preserve, or when a question needs individual professional review. The work addresses those points through explanations, structured steps, and forms that support the intended process.

My contribution

I organized and directed guidance, document workflows, and research supporting the Vincora project. The estate planning guide was originally used in the Asset Protection Association and brings related explanations together with linked indexes and reference sections. The later Vincora execution guide explains the proposed review and signing process, while its companion blank form records what each observer personally saw and heard.

Designing a usable process

The execution materials separate substantive review, authority choices, observation, signing, and record preservation. They include room to document uncertainty and assistance rather than forcing every observation into a favorable conclusion. The guide and blank record work together as a process and its supporting documentation.

Organizing guidance and research

A reference before, during, and after consultations

The estate planning guide gives practitioners and lawyers a reference they can use with clients throughout the planning process. Clients can prepare questions before a meeting, follow explanations during it, and revisit topics afterward. Its linked topic indexes make it an extended FAQ: a practical way to address questions that clients may forget or that a consultation cannot cover in full.

Research for a broader educational product

The national research memorandum and workbook examine how power-of-attorney differences across U.S. jurisdictions affect a proposed educational book and supporting resources. The workbook separates the jurisdictional matrix, sources, research flags, and architectural conclusions. That structure makes the basis for a drafting decision visible and records where additional verification remains necessary.

The resulting work

The result is a set of usable guides, a blank observation record, and a research structure for continued product development. The case demonstrates technical writing, workflow design, source organization, and the conversion of detailed requirements into materials that users and reviewers can navigate.

Reading the samples

The full 105-page estate planning guide is the original association document, presented under a clearer portfolio filename with its hyperlinks, bookmarks, original branding, and contents intact. It covers living trusts, trust funding, pour-over wills, powers of attorney, and related planning topics. The jurisdictional research retains its August 2026 cutoff and original scope.

Work product index

Browse the original work by type. Links open the PDF exhibits after the package is extracted with its files together.

Guides and educational materials

[Estate planning guide](#) | 105 pages

[Enhanced execution guide](#) | 4 pages

[Jurisdictional research memorandum](#) | 12 pages

Product and workflow design

[Estate planning guide](#) | 105 pages

[Enhanced execution guide](#) | 4 pages

[Witness observation record](#) | 2 pages

[Jurisdictional research workbook](#) | 67 pages

Forms and checklists

[Witness observation record](#) | 2 pages

Research and market analysis

[Jurisdictional research memorandum](#) | 12 pages

[Jurisdictional research workbook](#) | 67 pages

The following abstracts describe each sample. Original wording and document structure are retained, with privacy redactions and PDF conversion where needed. Workbook exhibits preserve saved source values in a readable static display.

Original work samples

Estate planning guide

Guides and educational materials · Product and workflow design

The complete 105-page original association guide is a linked reference for estate planning practitioners and lawyers to use with clients before, during, and after consultations. It brings living trusts, trust funding, pour-over wills, powers of attorney, and related topics into an extended FAQ clients can revisit. The original PDF is unchanged, preserving its 801 links and 156 bookmarks; only the portfolio filename is renamed.

[Open original PDF](#) | 105 pages

Enhanced execution guide

Guides and educational materials · Product and workflow design

The original California-edition guide describes suggested practices for reviewing and signing an enhanced durable power of attorney when understanding or communication may be questioned. It organizes preparation, choices, observers, signing, and records while preserving its original distinction between suggested practices and legal requirements.

[Open original PDF](#) | 4 pages

Witness observation record

Forms and checklists · Product and workflow design

A PDF of the complete blank special-circumstances observation form. It uses separate firsthand observations, checkboxes, open comment spaces, and an individual declaration to record the review and signing process. No completed client information is included.

[Open original PDF](#) | 2 pages

Original work samples

Jurisdictional research memorandum

Research and market analysis · Guides and educational materials

The original 12-page architectural memorandum explains how jurisdictional differences affect a proposed national power-of-attorney educational product. It sets out the research scope, findings, design consequences, source hierarchy, and remaining verification work. The original August 2, 2026 cutoff is retained.

[Open original PDF](#) | 12 pages

Jurisdictional research workbook

Research and market analysis · Product and workflow design

A complete readable PDF of all five saved worksheets: Read Me, State Matrix, Source Register, Research Flags, and Architecture Summary. The matrix covers all 50 states, D.C., and five inhabited territories using one jurisdiction per record view. The complete source register and every original field are retained.

[Open original PDF](#) | 67 pages