

Your estate plan, done right—without the months-long wait.

Vanilla Document Builder gives you attorney-quality estate planning documents in a fraction of the time, coordinated directly through your advisor—so nothing falls through the cracks.

Confused about estate planning?

Most people are. Wills, trusts, powers of attorney, fiduciaries—it's a lot of unfamiliar territory. Vanilla Document Builder walks you through the whole process with plain-English guidance, step by step, so you always know what you're deciding and why. Your advisor is with you throughout. And if your situation calls for more personalized legal guidance, we connect you directly to the Vanilla Attorney Network—100+ estate planning professionals across all 50 states—under one roof, at flat-fee pricing.

How it works

STEP 1

ANSWER A GUIDED QUESTIONNAIRE

A clear, visual intake process walks you through your key decisions to create your plan—no legal jargon, no confusion. Your advisor can see your progress in real time

STEP 2

REVIEW YOUR ATTORNEY-QUALITY DOCUMENTS

Built on templates designed by elite estate planning attorneys and tailored to your state. The same institutional quality used by leading wealth firms.

STEP 3

SIGN, EXECUTE, AND YOU'RE DONE

Download digitally, or choose print-and-ship for premium packaging. Once complete, your advisor has everything they need for ongoing planning conversations.

Documents included

- Revocable Living Trust or Last Will and Testament
- Pour-Over Will (if you have a Trust)
- Healthcare Advance Directive
- Financial Power of Attorney
- Certificate of Trust
- HIPAA Authorization
- Legacy subtrusts for asset protection and post-death management of assets
- Advanced Planning and Estate Tax Strategies

By the numbers



100+

estate planning professionals
across all 50 states



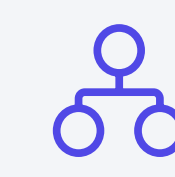
Minutes,
not months

to complete your intake



Flat-fee
pricing

— transparent, no surprises



All 50
states

covered with state-
specific templates

"Vanilla makes it easy for my clients to create estate documents while giving me a complete platform to manage ongoing estate advisor conversations."

DANA FOLEY,
FOUNDER & PARTNER, ACCELERANT LAW

Ready to get your estate in order?

Reach out to your advisor to get started. The process is simpler than you think—and your future self will thank you.