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Our Family Estate Plan

Husband
D.O.B.

Pour-Over Will
Personal Rep.
1 _____
2 _____
3 _____

Financial POA
Agents:
1 _____
2 _____
3 _____

Healthcare POA
Agents:
1 _____
2 _____
3 _____

Living Will
Agents:
1 _____
2 _____
3 _____

My Beneficiaries:
1 _____
2 _____
3 _____
4 _____
5 _____
6 _____
7 _____

Community/Separate Property Agreement

Our Family
Joint Revocable Living Trust

Trustees:	Custodian for Minors
1._____	1. _____
2. _____	2. _____
3. _____	3. _____

Trust Protector:

Recommended Funding Formula:

Division at First Death
All to Spouse?
Fund Family Trust?
Fund Marital Trust?

Family Trust
(Irrevocable)
Fund with Decedent's 1/2 CP and separate share up to exclusion(s)

Marital Trust
(Irrevocable)
Fund with balance of Decedent's Trust that will qualify for unlimited marital deduction

Survivor's Trust
(Revocable)
Fund with Survivor's 1/2 CP and separate share

Distribution at Second Death

Outright to **Individual** Beneficiaries
1 _____
2 _____
3 _____

Outright to **Charitable** Beneficiaires
1 _____
2 _____
3 _____

Held in Trust for Beneficiaries
1 _____
2 _____
3 _____

Held in Trust for Pet Beneficiaries
Trustee/Caregiver:
1 _____
2 _____
3 _____

Wife
D.O.B.

Pour-Over Will
Personal Rep.
1 _____
2 _____
3 _____

Financial POA
Agents:
1 _____
2 _____
3 _____

Healthcare POA
Agents:
1 _____
2 _____
3 _____

Living Will
Agents:
1 _____
2 _____
3 _____

My Beneficiaries
1 _____
2 _____
3 _____
4 _____
5 _____
6 _____
7 _____