

C. RESIDUE - Normally, your spouse is the beneficiary of your residuary estate (Example: Any property passing under your Will but not specifically bequeathed to others). Do you want your spouse to be your residuary beneficiary?

Yes _____ No _____

If Yes,

1. Do you want the property to be given outright or in the trust to your spouse?

Outright _____ In Trust _____

2. If the property is to be placed in trust, select how the property in the trust should be distributed at your spouse's death.

a. Divided equally among your children _____

b. Divided among your children as your spouse determines _____

c. Other (please describe)

IF NO, PLEASE EXPLAIN:

D. CHOICE OF EXECUTOR - Initial Executor would normally be surviving spouse. Is this your desired choice for initial Executor in this case?

Yes _____ No _____

If no, list choice for initial Executor and successor Executor in the event the initial Executor is unable or unwilling to serve:

Initial Executor

Successor Executor

Name:

Name:

Address:

Address:

Relationship:

Relationship

E. CHOICE OF TRUSTEE - Initial Trustee can be any individual whom you trust to handle financial affairs for your family. Examples include your business associates, family lawyer or accountant or any other person who has demonstrated to you his financial acumen.

1. Who should be designated as Trustee(s) of any trust which is established? Please note if your Will includes a “credit shelter trust” (also referred to as “unified credit trust”), you should name a Co-Trustee to serve along with your spouse. In other words, your spouse should not be the sole Trustee.

Name:

Name:

Address:

Address:

Relationship:

Relationship

2. Who should be designated as successor Trustee(s)? List by order of preference:

Name:

Address:

a.

b.

c.

PLEASE NOTE: You should make sure you contact your designated Trustee(s) to make sure that they are willing to accept the responsibility of being your Trustee.

F. DESPOSITIVE PROVISIONS FOR MINOR CHILDREN - Born to or adopted by Husband and wife (indicate which are adopted):

Name: DOB/Age: Marital status: Grandchild:

1. Husband's children by prior marriage/relationship:

Name: DOB/Age: Marital status: Grandchild:

2. Wife's children by prior marriage/relationship:

Name: DOB/Age: Marital status: Grandchild:

3. Do any of your dependents have a disability? Please describe:

4. Assets which will be held for the benefit of your minor children in trust will need to be carefully administered. The following represents a list of elections that must be

made with respect to assets held in trust for children.

- a. Are separate shares to be created for each child?

Immediately? Yes _____ No _____

When the youngest reaches age 21? Yes _____ No _____

- b. Until what age should the assets be held in trust for the children?
Until the youngest reaches a certain age?

Yes _____ No _____

If Yes, what age?

Is each child's shares to be subject to distribution at a specific age?

Yes _____ No _____

Age & Percentage

G. CHOICE OF GUARDIAN OF PERSON AND GUARDIAN OF ESTATE

1. Whom do you trust the most to take the responsibility for the physical well-being of your minor children? That is, who would you like to see your minor children live with in the event that both you and your spouse pass away? This is called Guardian of Person

Please list names of person(s) to act as Guardian of Person of your minor children in order of priority (if more than one named):

Name:

Address:

- a.
b.
c.

2. The person designated as Guardian of your children's well-being (also referred to as

“Guardian of the Person”) need not be the same person or persons who are responsible for taking care of your children’s property while your children are minors. Do you want the same person who is Guardian of your children’s well-being (Guardian of Person) to be the same person designated as Guardian of your children’s property (also referred to as “Guardian of the Estate”)?

Yes _____ No _____

If no, Please list name(s) of person(s)/entity(ies) to act as Guardian of Property of your minor children in order of priority (if more than one named:

Name:

Address:

- a.
- b.
- c.