

For Illustration Purposes Only
Last Updated 5/2/2011

PROPOSED DISPOSITION OF THE ESTATE OF [W]
IF HER HUSBAND, [H], SURVIVES HER

Tangible Personal Property	Value	Joint Property with Right of Survivorship (1/2 equity)	Value	Retirement Plans (1)	Value	Other Individual Property	Value
Car, household furnishings, etc. (est.):	\$100,000	Residence	\$0	401k	\$0	<input type="checkbox"/> Revocable Living Trust dated [] [insert joint accts at half value here] (2)	\$0
Total	\$100,000	Total	\$0	Total	\$0	Subtotal Living Trust Assets [List Insurance] (1) Total	\$0

Outright to Spouse
\$100,000

Family Trust*
5% Million in 2011, \$1 million after 2012

(if disclaimed by spouse)

This trust receives property that your spouse disclaims. Your spouse is the primary beneficiary of the trust. At your spouse's death, the property passes to Trust for Children.

Trust for Children

Single Trust until youngest reaches age 22. Then separate trust for each child with outright distributions: 1/3 @ 25, 30 and 35 years.

*The applicable exclusion amounts (the amount that can pass free of federal estate tax)

(1) Beneficiary designation changes should be made for the accounts listed under "Retirement Plans" and for any life insurance listed under "Other Individual Property."

(2) You should make account title changes following your document signing as follows:

From individual name to Revocable Living Trust:

From joint names to Revocable Living Trusts:

(1/2 to each Trust will work well, but titling more to []'s Trust may save taxes if she dies first)

For further instructions on (1) and (2) above, see cover letter and Memorandum with your original, signed documents or call our office at (704) 552-5160.