

John & Jane Doe Estate Plan

Husband

Executor: _____

Pour-Over Will

Durable Power of Attorney for Property

Advance Health Care Directive

Agent: _____

Agent: _____

Non-Trust Property Controlled By Will

Marital Property Agreement

John & Jane Doe
Living Trust

Trustee: _____

Gifting Powers: Yes No

Executor: _____

Wife

Pour-Over Will

Durable Power of Attorney for Property

Advance Health Care Directive

Agent: _____

Agent: _____

Non-Trust Property Controlled By Will

Division At First Death

Applicable Exclusion Amount

Decedent's Trust
(Irrevocable)

Trustee: _____

- Income: All to Surviving Spouse
 Discretionary to Spouse and Others
 Unitrust Percentage _____ %
 Remarriage Restriction
- Principal: None
 HEMS
 5K or 5% Withdrawal Right
 Limited Power of Appointment
 Remarriage Restriction

Distribution At Second Death

Balance of Decedent's 1/2 of Community Property Separate Property

Marital Trust
(Irrevocable)

Trustee: _____

- Income: All to Surviving Spouse (mandatory)
Principal: None
 HEMS
 5K or 5% Withdrawal Right
 Limited Power of Appointment
 Remarriage Restriction

- Outright to Beneficiaries
 Common Trust: Terminating Age _____ College Grad _____
 Staggered Trusts distributed at ages: _____, _____, _____
 Beneficiary Controlled Trust
 Special Needs Trust

Survivor's 1/2 of Community Plus All Separate Property

Survivor's Trust
(Revocable)

Survivor Has Full Control

Trustee: _____

Gifting Powers: Yes No

Guardian for Minor Children:

Specific Distributions:
