

DISTRIBUTION OF PROPERTY ON DEATH

Bequests of Personal Property

IF YOU DESIRE TO MAKE SPECIFIC BEQUESTS OF PERSONAL PROPERTY YOU WILL WRITE YOUR OWN LETTER DESCRIBING THOSE GIFTS AND I WILL INCORPORATE THAT LETTER IN YOUR WILL OR TRUST.

GIFTS.GIFTS OF FURRY, SLIMY AND FEATHERY FAMILY MEMBERS CAN BE RESOLVED HERE, BUT THERE WILL BE A SEPARATE DISCUSSION CONCERNING THEM.

List specific bequests you wish to make, if any, indicating what and to whom. In the event the individual or organization does not survive, please specify if the gift will be distributed to that individuals issue, to someone else, or if the gift will lapse and become a part of the residue of your estate, as in the following examples:

- 1) Diamond and ruby cocktail ring to John Doe, my friend, 1234 Easy Street, Avocado, California. If John Doe is not living, to his issue equally.
- 2) Ermine stole and Hobie catamaran to Jane Roe, my sister-in-law, 4321 Memory Lane, Hometown, Ohio. If Jane Roe is not living, to Mary Doe, my friend, 1234 Easy Street, Avocado, California.
- 3) Antique sheet music collection and 1 harpsichord to Best School of Music Scholarship fund, 51 Crescendo Lane, Solotown, Pennsylvania. If this scholarship fund is not in existence at my death, this gift shall lapse.

- 1) _____

- 2) _____

- 3) _____

- 4) _____

Specific Bequests

OTHER SPECIFIC BEQUESTS WILL BE WRITTEN INTO YOUR WILL OR TRUST.

List specific bequests you wish to make, if any, indicating what and to whom. In the event the individual or organization does not survive, please specify if the gift will be distributed to that individuals issue, to someone else, or if the gift will lapse and become a part of the residue of your estate, as in the following examples:

- 1) The sum of \$5,000 to Jane Roe, my sister-in-law, 4321 Memory Lane, Hometown, Ohio. If Jane Roe is not living, to Mary Doe, my friend, 1234 Easy Street, Avocado, California.
- 2) The sum of \$1,000 to Boy Scouts of America, c/o National Headquarters, 321 Right Path, Eagletown, New York, or to its successor. If Boy Scouts of America or its successor is not an organization at the time of my death, this gift shall lapse.

1) _____

2) _____

3) _____

4) _____

RESIDUE – Gift of Your Remaining Assets

What is your desired disposition of your property on your death and/or your spouse's death?

If married:

All to your spouse on death Yes No

To your children in equal shares on your
Spouse's death Yes No

If not married:

To your children in equal shares Yes No

If neither of the above apply, to whom do you wish to leave your property, and in what proportions?
Please list full names and addresses.

1. Name: _____

Address: _____

Proportion: _____

2. Name: _____

Address: _____

Proportion: _____

3. Name: _____

Address: _____

Proportion: _____

Children's Ages and Shares for Distributions

When should your children receive their distributions?

Outright on your death: Yes No

Outright on your spouse's death: Yes No

If not outright, please provide age(s) of distribution and the fractional or percentage interest of each child's share to be distributed at specified age(s):

Age	Fractional or % Interest of Share
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EXAMPLE:

Name of Child: Jane Alexandra Smith

<u>age 21</u>	<u>1/4 of share</u>
<u>age 24</u>	<u>1/2 of share</u>
<u>age 30</u>	<u>Remainder of share</u>

Name of Child: _____

_____	_____
_____	_____
_____	_____

Name of Child: _____

_____	_____
_____	_____
_____	_____

If a child or children or yours predecease you:

Would you like their issue (your grandchildren) to receive their distribution?

Yes No

If yes, at same ages listed above?

Yes No

Simultaneous Death

Desired disposition of estate in the event client, spouse and issue die simultaneously:

- EXAMPLES:
- 1) Your heirs (determined by California law)
 - 2) Specific named individuals (other than your heirs generally)
 - 3) A specific charity (Red Cross, Boys Town, Girl Scouts)

1) _____

2) _____

3) _____
