

# John and Jane Doe Family Estate

May 1, 2022

**John**  
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 \_\_\_\_\_

**Jane**  
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**

**John and Jane Doe Family Trust**  
(Revocable Joint 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**

Oughtright to **Individual** Beneficiaries  
1 \_\_\_\_\_  
2 \_\_\_\_\_  
3 \_\_\_\_\_

Oughtright to **Charitable** Beneficiaries  
1 \_\_\_\_\_  
2 \_\_\_\_\_  
3 \_\_\_\_\_

**Held in Trust** for Beneficiaries  
1 \_\_\_\_\_  
2 \_\_\_\_\_  
3 \_\_\_\_\_

**Held in Trust** for Pet Beneficiaries  
Caregiver/Agents:  
1 \_\_\_\_\_  
2 \_\_\_\_\_  
3 \_\_\_\_\_