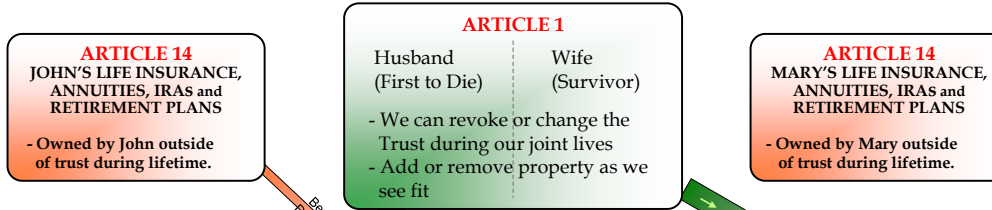


# Sample Living Trust

## ARTICLE 3 Trustees:

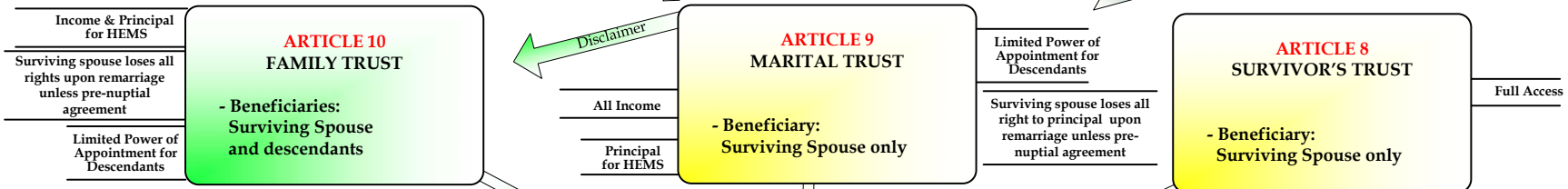
- Disability & Death - (1) Spouse  
(2) Alley B. Sample  
(3) Suzie D. Sample  
(4) XYZ Trust Company
- Children's Trust - Cotrustee at age 25 with Independent Trustee of choice
- Joe's Trust - Alley B. Sample and XYZ Trust Company

- ARTICLE 1 – Creation of Trust
- ARTICLE 2 – Family Information
- ARTICLE 3 – Trustee Succession/Trust Protector
- ARTICLE 4 – Administration Upon Incapacity
- ARTICLE 5 – Administration Upon Death
- ARTICLE 6 – Distribution of Tangible Personal Property
- ARTICLE 7 – Creation of Trust Shares
- ARTICLE 8 – Survivor's Trust
- ARTICLE 9 – Marital Trust
- ARTICLE 10 – Family Trust
- ARTICLE 11 – Distribution to Beneficiaries
- ARTICLE 12 – Remote Contingent Distribution
- ARTICLE 13 – Beneficiaries-Special Circumstances
- ARTICLE 14 – Retirement Plans & Life Insurance
- ARTICLE 15 – Trust Administration
- ARTICLE 16 – Our Trustee's Powers
- ARTICLE 17 – General Provisions



BOTH ALIVE

FIRST DEATH (Trust Administration)



FIRST DEATH

SECOND DEATH (Trust Administration)

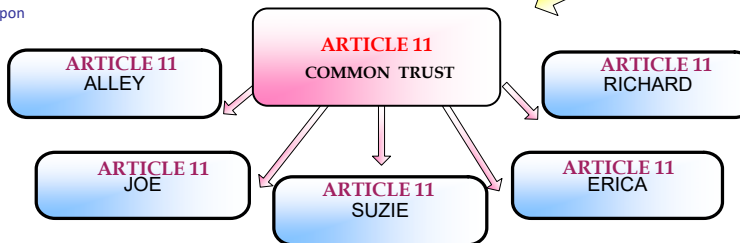
- H** EALTH
- E** DUCATION
- M** AINTENANCE
- S** UPPORT

**ALLEY'S TRUST:**  
- Held in trust for life  
- Income and Principal for HEMS  
- General Power of Appointment upon death

**JOE'S TRUST:**  
- Distributed to Special needs Trust  
- Held in trust for life  
- Distributions for special needs only

**SUZIE'S TRUST:**  
- Held in trust for life  
- Income and Principal for HEMS  
- General Power of Appointment upon death

**ERICA'S TRUST:**  
- Income and Principal for HEMS  
- 1/3 of trust property distributed free of trust at age 25; 1/3 distributed 5 years later; remaining trust property 10 years after first distribution  
- General Power of Appointment upon death



**RICHARD'S TRUST:**  
- Distributed outright, free of trust  
- General Power of Appointment upon death

**COMMON TRUST:**  
- Held in common trust until youngest child reaches age 18  
- Income and Principal for HEMS  
- Advances to pay costs of post-high school and graduate school education, permit child to enter into or engage in business or profession, purchase a personal residence, pay expenses of a first wedding, or pay for any other extraordinary opportunity or expense deemed to be in the best interest of the child.

Article 4 and Survivor's Trust Disability Plan  
- Attending physician and our health care agent will determine our disability.  
- Use our Trust to take care of us, our dependent children/parents/relatives.  
- Use resources for home health care rather than a nursing home if medically feasible.

Article 12 Remote Contingent Distribution  
If there is no qualified beneficiary, our Trustee shall distribute 1/2 of that portion to those persons who would inherit it had John A. Sample then died intestate owning such property, and 1/2 to those persons who would inherit it had Mary K. Sample then died intestate owning such property, as determined and in the proportions provided by the laws of Wisconsin then in effect.



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