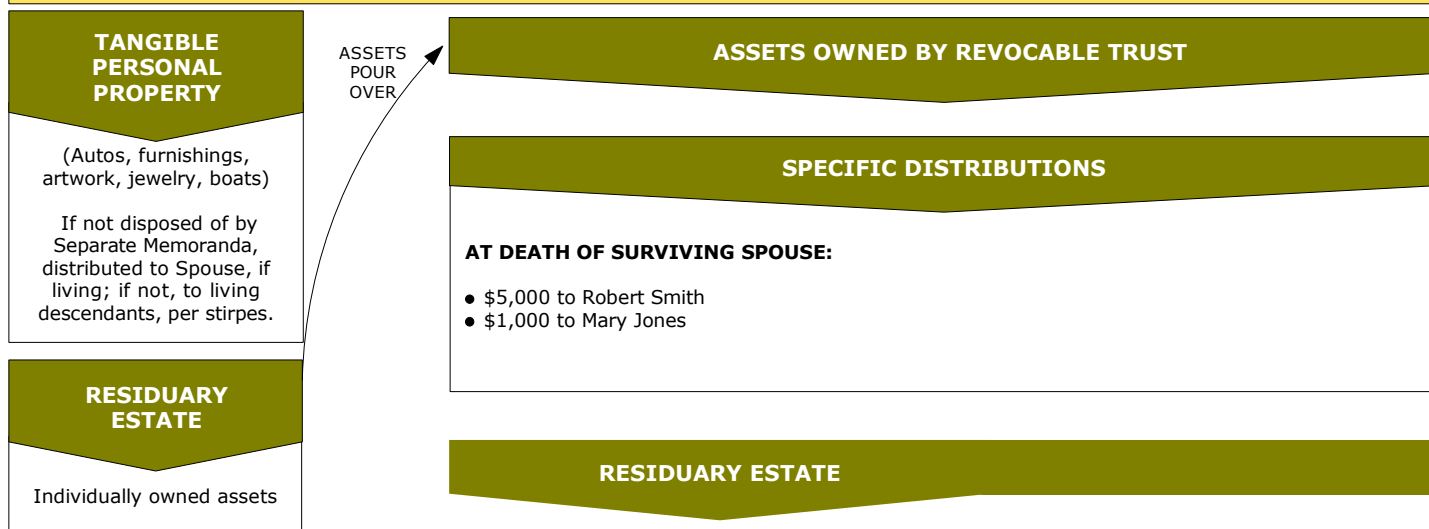


John A. Doe Estate Plan

Last updated: 1/1/22

WILL	ADVANCE DIRECTIVE	POWER OF ATTORNEY	REVOCABLE TRUST
<p>dated 11/28/17</p> <p>PERSONAL REP.: Spouse, Jane B. Doe</p> <p>SUCCESSOR: Son, Brent C. Doe</p> <p>CODICILS: None</p>	<p>dated 11/28/17</p> <p>HEALTHCARE SURROGATE: Spouse, Jane B. Doe</p> <p>ALTERNATE SURROGATE: Son, Brent C. Doe</p>	<p>dated 11/28/17</p> <p>ATTORNEY-IN-FACT: Spouse, Jane B. Doe (acting alone) or Son, Brent C. Doe (acting with Jane's concurrence), or if Jane is incapacitated, Brent (acting alone).</p>	<p>dated 8/9/16</p> <p>CO-TRUSTEES: John A. Doe and Jane B. Doe</p> <p>SUCCESSOR: Son, Brent C. Doe</p> <p>LAST AMENDMENTS: 1st A&R, ex. 11/28/17</p>

AT DEATH OF JOHN A. DOE



IF JOHN A. DOE IS FIRST TO DIE...

ESTATE TAX SHELTERED TRUST	MARITAL TRUST
<ul style="list-style-type: none"> Created for benefit of Surviving Spouse and Descendants. Income and principal as needed for health, maintenance, education and support. Spouse has limited power to appoint among descendants at Spouse's death. If Spouse fails to appoint, to descendants, per stirpes, in lifetime trusts. 	<ul style="list-style-type: none"> Created for benefit of Surviving Spouse. All income (quarterly). Principal as needed for health, maintenance, education and support. Spouse may withdraw 5% of principal annually (non-cumulatively). Spouse has limited power to appoint among descendants at Spouse's death. If Spouse fails to appoint, to descendants, per stirpes, in lifetime trusts.

IF JOHN A. DOE IS SECOND TO DIE...

Separate Trusts For Descendants GST-Exempt Trusts	Separate Trusts For Descendants Non-GST-Exempt Trusts
<ul style="list-style-type: none"> Income and principal for Beneficiary and Beneficiary's descendants as needed for health, maintenance, education and support. Beneficiary has power to appoint at beneficiary's death (limited among your descendants). If Beneficiary fails to appoint, then to Beneficiary's descendants, per stirpes, in lifetime trusts. Each Beneficiary may become a Trustee of their separate trust at age 30. 	<ul style="list-style-type: none"> Income and principal for Beneficiary and Beneficiary's descendants as needed for health, maintenance, education and support. Beneficiary has power to appoint at beneficiary's death (limited among your descendants). If Beneficiary fails to appoint, then to Beneficiary's descendants, per stirpes, in lifetime trusts. Each Beneficiary may become a Trustee of their separate trust at age 30.

Any property not effectively disposed of by the provisions in the trusts above will be distributed to the Grantor's then living heirs as determined under Florida law.

John A. Doe Estate Plan

ASSETS

TANGIBLE PERSONAL PROPERTY

- 2007 Mercedes; Value: \$50,000
- Artwork \$10,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/14

ASSETS DISTRIBUTED BY BENEFICIARY DESIGNATION

- Pershing IRA Account No. 12378; Value: \$1,048,943; Beneficiary - Jane B. Doe

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/14

ASSETS CURRENTLY OWNED INDIVIDUALLY

- Pershing Account No. 10002; Value: \$350,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/14



JOHN A. DOE REVOCABLE TRUST

ASSETS

- First National Bank Checking Account No. 12345; Value: \$60,000
- J&J Limited Partnership - (99% Limited Partner)
- ACME Properties, LLC - (33 1/3% ownership interest)
- JJD, Inc. - (50% ownership interest)
- Pershing Account No. 9876; Value: \$1,350,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/14

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

ASSETS OWNED JOINTLY WITH SPOUSE

- First National Bank Checking Account No. 45670; Value: \$10,000
- Golf Club Membership; Value: \$20,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/14