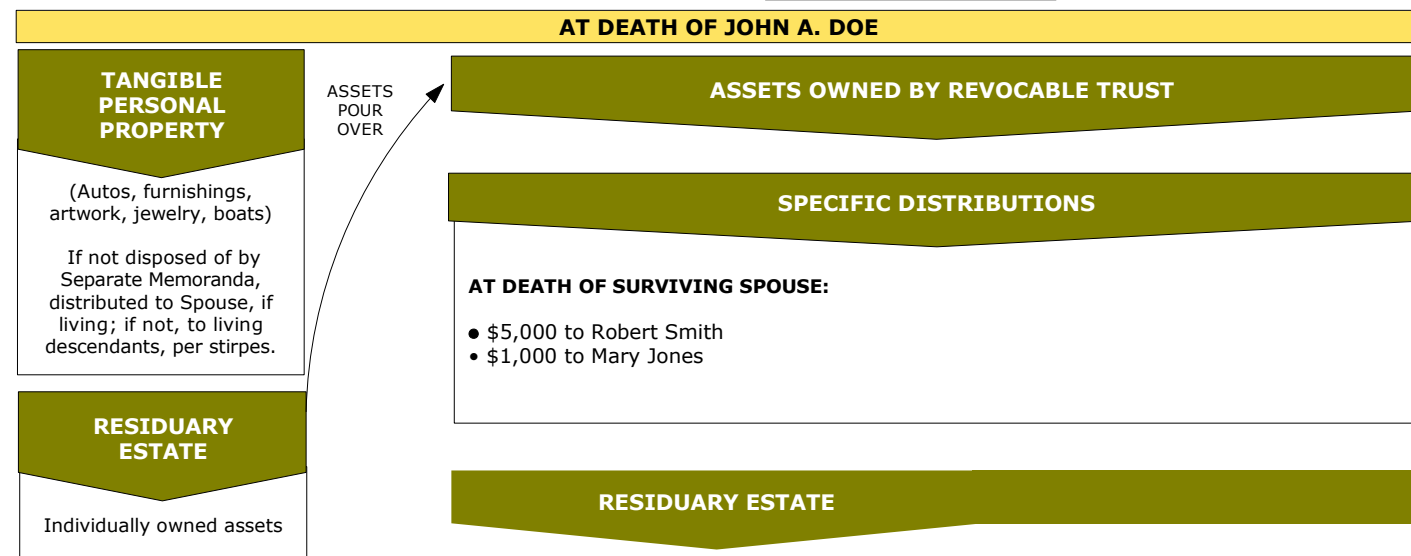


John A. Doe Estate Plan

WILL dated 06/15/03 PERSONAL REP.: Spouse, Jane B. Doe SUCCESSOR: Son, Brent C. Doe CODICILS: None	ADVANCE DIRECTIVE dated 10/12/08 HEALTHCARE SURROGATE: Spouse, Jane B. Doe ALTERNATE SURROGATE: Son, Brent C. Doe	POWER OF ATTORNEY dated 10/12/08 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).	REVOCABLE TRUST dated 06/15/03 CO-TRUSTEES: John A. Doe and Jane B. Doe SUCCESSOR: Son, Brent C. Doe LAST AMENDMENTS: 1st A&R, ex 10/12/08
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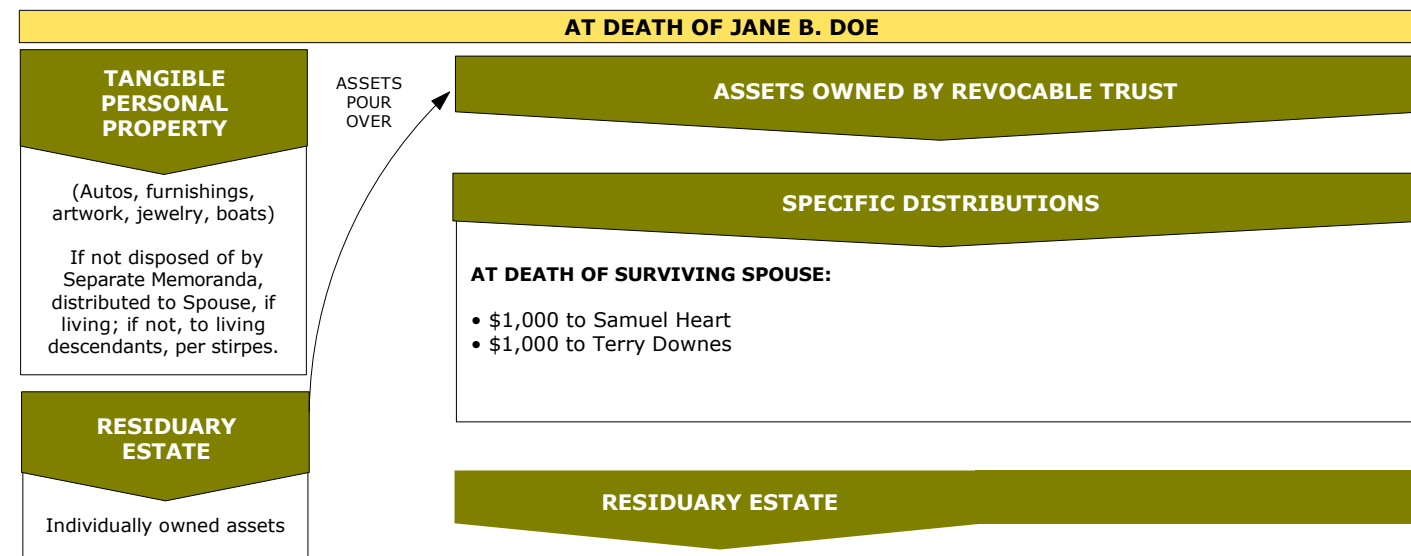
IF JOHN A. DOE IS FIRST TO DIE... ESTATE TAX SHELTERED TRUST <ul style="list-style-type: none"> Created for benefit of Surviving Spouse and Descendants. Income and principal as needed for health, maintenance, education and support. Spouse has limited power to appoint among descendants at Spouse's death. If Spouse fails to appoint, to descendants, per stirpes, in lifetime trusts. 	MARITAL TRUST <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.
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IF JOHN A. DOE IS SECOND TO DIE... Separate Trusts For Descendants 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. 	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.
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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.

Jane B. Doe Estate Plan

WILL dated 06/15/03 PERSONAL REP.: Spouse, John A. Doe SUCCESSOR: Son, Brent C. Doe CODICILS: None.	ADVANCE DIRECTIVE dated 10/12/08 HEALTHCARE SURROGATE: Spouse, John A. Doe ALTERNATE SURROGATE: Daughter, Carol D. Doe	POWER OF ATTORNEY dated 10/12/08 ATTORNEY-IN-FACT: Spouse, John A. Doe (acting alone) or Son, Brent C. Doe (acting with John's concurrence), or if John is incapacitated, Brent (acting alone).	REVOCABLE TRUST dated 06/15/03 CO-TRUSTEES: Jane B. Doe and John A. Doe SUCCESSOR: Son, Brent C. Doe LAST AMENDMENTS: 1st A&R, ex 10/12/08
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IF JANE B. DOE IS FIRST TO DIE... ESTATE TAX SHELTERED 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. 	MARITAL TRUST <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.
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IF JANE B. DOE IS SECOND TO DIE... Separate Trusts For Descendants 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. 	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.
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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

- 2018 Mercedes; Value: \$50,000
- Artwork \$10,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/19

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 12/31/19

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 12/31/19

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 12/31/19

ASSETS OWNED JOINTLY

- First National Bank Checking Account No. 45670; Value: \$10,000
- Golf Club Membership; Value: \$20,000
- 100 Riche Drive, OH; Value: \$2,200,000
- Tiburon, Naples, FL; Value: \$2,300,000
- Club Regency Timeshare; Value: \$60,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/19

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

Jane B. Doe Estate Plan

ASSETS

TANGIBLE PERSONAL PROPERTY

- Jewelry - Valued at Approximately \$30,000
- 2007 Cadillac CTS; Value: \$42,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/19

ASSETS DISTRIBUTED BY BENEFICIARY DESIGNATION

- Pershing IRA Account No. 3123; Value: \$425,000; Beneficiary - John Doe

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 6/30/19

ASSETS CURRENTLY OWNED INDIVIDUALLY

- First National Checking Account No. 001236; Value: \$25,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/19

JANE B. DOE REVOCABLE TRUST

ASSETS

- First National Bank Checking Account No. 12345; Value: \$100,000
- ABC, LLC - (100% ownership interest)
- Bay Properties, LLC - (33 1/3% ownership interest)
- JJD, Inc. - (50% ownership interest)
- Pershing Account No. 1234; Value: \$975,000

Source: Doe Family Account Statement; and John and Jane Doe Net Worth Statement dated 12/31/19

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

OTHER TRUSTS

JOHN A. DOE GIFTING TRUST

dated 01/25/08

TAX ID#
(Grantor Trust uses John's SSN)

TRUSTEES:
Spouse, Jane B. Doe

SUCCESSOR TRUSTEES:
Son, Brent C. Doe; and Daughter, Carol D. Doe

ASSETS

- Pershing Brokerage Account No. 02-33-4144; Value: \$1,025,219.60

Source: Pershing Account Statement dated 12/31/19

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

DISPOSITIVE PROVISIONS

DURING LIFETIME OF JOHN A. DOE:
Pot Trust f/b/o Spouse and Lineal Descendants:

- Income and principal as needed for health, maintenance, education and support, with no duty to equalize.
- Spouse has power of appointment limited to Grantor's descendants, at Spouse's death.
- If Spouse fails to appoint, Lifetime Trusts for descendants, per stirpes.

AT DEATH OF BOTH JOHN A. DOE AND JANE B. DOE:
Separate Lifetime Trusts for Descendants, per stirpes (dynasty trusts that last for 360 years):

- Income and principal for Beneficiary (initially child) and Beneficiary's descendants as needed for health, maintenance, education and support.
- Each Beneficiary has power to appoint (limited among Grantor's descendants) at Beneficiary's death.
- If Beneficiary fails to appoint, then Lifetime Trusts for Beneficiary's descendants, per stirpes.
- Each Beneficiary may become Trustee of their own separate trust at age 30.

JOHN A. DOE AND JANE B. DOE IRREVOCABLE LIFE INSURANCE TRUST

dated 01/05/05

TAX ID# 11-2345678

TRUSTEE:
Son, Brent C. Doe

SUCCESSOR TRUSTEE:
Daughter, Carol D. Doe

ASSETS

- Surety Life Insurance Co., Policy No. 495245-1; Death Benefit \$500,000; Insured: John A. Doe; Cash Surrender Value as of 12/31/14: \$13,752.44

Source: Letter from Surety Life Insurance Co. dated 12/31/19

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

DISPOSITIVE PROVISIONS

DURING LIFETIME OF JOHN A. DOE AND JANE B. DOE:
Pot Trust f/b/o Lineal Descendants:

- Income and principal as needed for health, maintenance, education and support, with no duty to equalize.

AT DEATH OF BOTH JOHN A. DOE AND JANE B. DOE:
Separate Lifetime Trusts for Descendants, per stirpes:

- Income and principal for Beneficiary (initially child) and Beneficiary's descendants as needed for health, maintenance, education and support.
- Each Beneficiary has power to appoint (limited among Grantor's descendants) at Beneficiary's death.
- If Beneficiary fails to appoint, then Lifetime Trusts for Beneficiary's descendants, per stirpes.
- Each Beneficiary may become Trustee of their own separate trust at age 30.

JOHN A. DOE AND JANE B. DOE CHARITABLE REMAINDER UNITRUST

dated 01/25/08

TAX ID# 22-3456789

TRUSTEES:
John A. Doe and Jane B. Doe

SUCCESSOR TRUSTEES:
Son, Brent C. Doe; and Daughter, Carol D. Doe

ASSETS

- Pershing Account No. 02-43-2894; Value: \$925,233.20
- Pershing Account No. 02-43-8895; Value: \$523,098.18

Source: Pershing Account Statements dated 12/31/19

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

DISPOSITIVE PROVISIONS

DURING LIFETIME OF JOHN A. DOE AND JANE B. DOE:

- Payment to John A. Doe of 8% of the net fair market value of the trust assets valued as of the first day of each taxable year, payable in quarterly installments.
- If Jane B. Doe survives John A. Doe, payments will continue for her lifetime.

AT DEATH OF SURVIVING SPOUSE:

- Remaining trust assets will be distributed to the John A. Doe and Jane B. Doe Family Foundation.

JOHN A. DOE AND JANE B. DOE FAMILY FOUNDATION

dated 01/25/08

TAX ID# 33-4567890

TRUSTEES:
John A. Doe and Jane B. Doe

SUCCESSOR CO-TRUSTEES:
Son, Brent C. Doe; and Daughter, Carol D. Doe

ASSETS

- Pershing Brokerage Account No. 02-39-2254; Value: \$250,515.43

Source: Pershing Account Statement dated 12/31/19

LIABILITIES

TO BE PROVIDED BY CLIENT, IF ANY.

Source:

DISPOSITIVE PROVISIONS

- A charitable entity that will receive the residue of the John A. Doe and Jane B. Doe Charitable Remainder Unitrust dated 01/25/08.
- Trustees are authorized to act in furtherance of the Foundation's charitable, religious, scientific, literary or education (tax-exempt) purposes. The Foundation may not participate or intervene in any political campaign or attempt to influence legislation either by attempting to affect public opinion or by communicating with any government official or employee.
- When the Trustees decide to terminate the Foundation, the Foundation's remaining assets must be distributed or expended for exempt purposes. Generally, a foundation's remaining assets are distributed to qualified charitable organizations selected by the Trustees for the exempt purposes they designate.

John A. Doe and Jane B. Doe Business Entities

Limited Liability Companies, Limited Partnerships and Corporations

ACME PROPERTIES, LLC	ABC, LLC	BAY PROPERTIES, LLC	J&J, LP	JJD, INC.
<p>A Florida LLC (Taxed as Partnership) EIN# 12-1234567 <i>Operating Agreement on file dated 10/01/03</i> MANAGER(S): John A. Doe Date of Formation: 10/01/03</p>	<p>A Florida LLC (Disregarded Entity) EIN# 23-4567890 <i>Operating Agreement on file dated 11/22/04</i> MANAGER(S): Jane B. Doe Date of Formation: 11/22/04</p>	<p>A Florida LLC (Taxed as Partnership) EIN# 34-5678901 <i>Operating Agreement on file dated 09/10/08</i> MANAGER(S): Jane B. Doe Date of Formation: 09/10/08</p>	<p>A Florida LP (Taxed as Partnership) EIN# 45-6789012 <i>Partnership Agreement on file dated 10/01/02</i> GENERAL PARTNER: JJD, Inc. Date of Formation: 10/01/02</p>	<p>A Florida Corporation (Taxed as S-Corp) EIN# 56-7890123 <i>Bylaws on file dated 05/04/03</i> PRESIDENT: John A. Doe Date of Formation: 05/04/01</p>
<p>ASSETS</p> <ul style="list-style-type: none"> 4444 Prosperity Drive, Clearwater, Florida (1/3 interest); FMV as of 1/1/11: \$1.2 mil <p>Source: Property Appraiser</p>	<p>ASSETS</p> <ul style="list-style-type: none"> 2590 Wealth Highway, No., Venice Beach, Florida (100% interest); FMV as of 1/1/11: \$825,000 <p>Source: Property Appraiser</p>	<p>ASSETS</p> <ul style="list-style-type: none"> 1234 Smooth Sailing Road, Jacksonville, Florida (1/3 interest); FMV as of 1/1/11: \$1.3 mil <p>Source: Property Appraiser</p>	<p>ASSETS</p> <ul style="list-style-type: none"> Pershing Acct #123-02222; Value: \$25,400.22 Pershing Acct #PD-025422; Value: \$1,424,130.91 <p>Source: Pershing Account Statement dated 12/31/19</p>	<p>ASSETS</p> <ul style="list-style-type: none"> Pershing Acct #3PD-348985; Value: \$82,700.98 Pershing Acct #3PD-348986; Value: \$67,011.28 Pershing Acct #3PD-348987; Value: \$97.44 Pershing Acct #3PD-348988; Value: \$524,253.34 <p>Source: Pershing Account Statement dated 12/31/19</p>
<p>LIABILITIES</p> <ul style="list-style-type: none"> Loans Now mortgage, \$622,018 balance as of 12/31/14 <p>Source: Harry Jones CPA spreadsheet dated 12/31/14</p>	<p>LIABILITIES</p> <ul style="list-style-type: none"> Loans Now mortgage, \$230,129 balance as of 12/31/14 <p>Source: Harry Jones CPA spreadsheet dated 12/31/14</p>	<p>LIABILITIES</p> <p>None.</p> <p>Source: Harry Jones CPA spreadsheet dated 12/31/14</p>	<p>LIABILITIES</p> <p>TO BE PROVIDED BY CLIENT, IF ANY.</p> <p>Source:</p>	<p>LIABILITIES</p> <p>TO BE PROVIDED BY CLIENT, IF ANY.</p> <p>Source:</p>
<p>OWNERSHIP</p> <p>Members/Amounts:</p> <ul style="list-style-type: none"> John A. Doe Revocable Trust - 33-1/3% interest Robert Smith - 33-1/3% interest Mary Jones - 33-1/3% interest 	<p>OWNERSHIP</p> <p>Members/Amounts:</p> <ul style="list-style-type: none"> Jane B. Doe Revocable Trust - 100% interest 	<p>OWNERSHIP</p> <p>Members/Amounts:</p> <ul style="list-style-type: none"> Jane B. Doe Revocable Trust - 33-1/3% interest Samuel Heart - 33-1/3% interest Terry Downes - 33-1/3% interest 	<p>OWNERSHIP</p> <p>Members/Amounts:</p> <ul style="list-style-type: none"> John A. Doe Revocable Trust - 99% LP Interest in J&J, LLC JJD, Inc. - 1% GP Interest 	<p>OWNERSHIP</p> <p>Members/Amounts:</p> <ul style="list-style-type: none"> John A. Doe Revocable Trust - 50.00% Jane B. Doe Revocable Trust - 50.00%