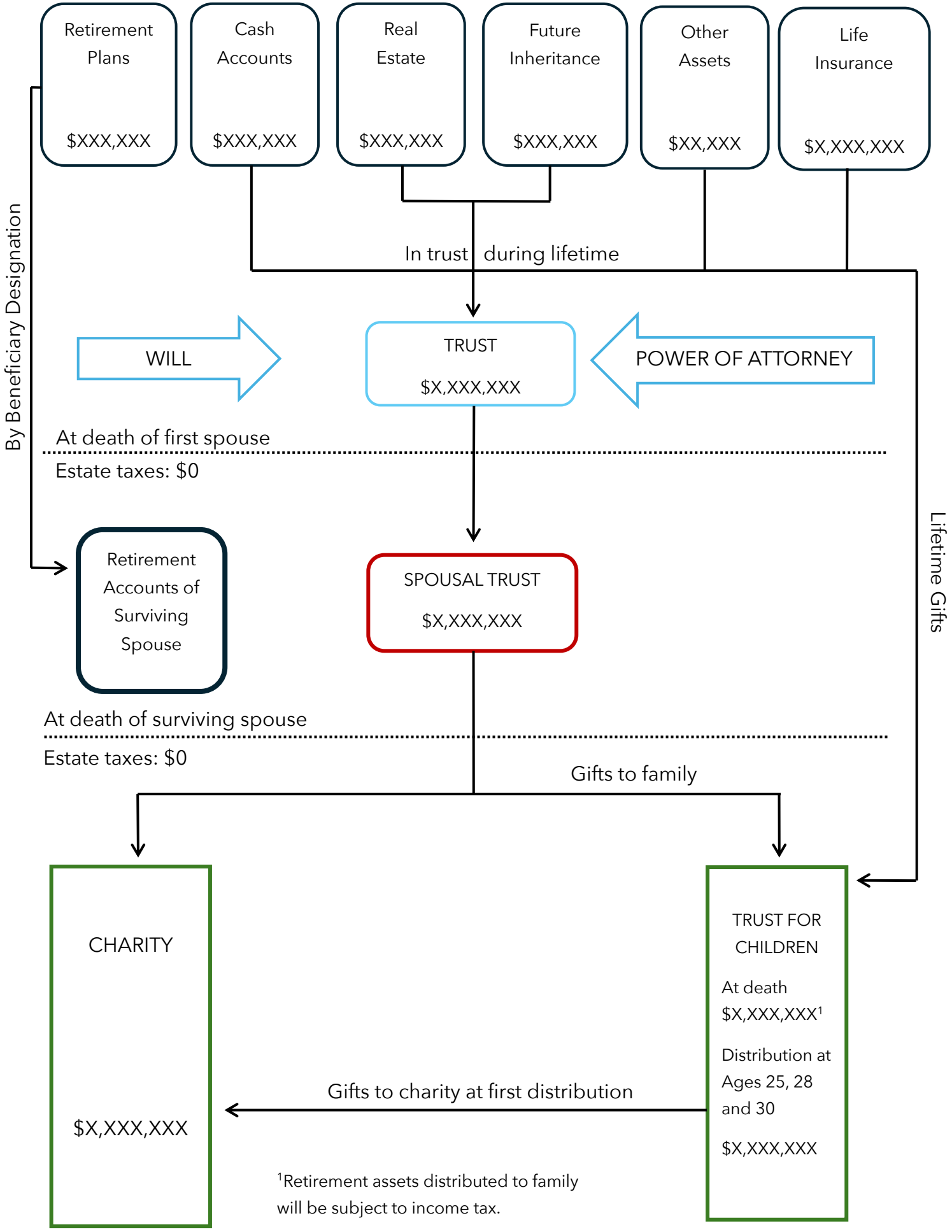
Retirement Plans
$XXX,XXX
Cash Accounts
$XXX,XXX
Real Estate
$XXX,XXX
Future Inheritance
$XXX,XXX
Other Assets
$XX,XXX
Life Insurance
$X,XXX,XXX
By Beneficiary Designation
In trust during lifetime
WILL
TRUST
$X,XXX,XXX
POWER OF ATTORNEY
At death of first spouse
Estate taxes: $0
Retirement Accounts of Surviving Spouse
SPOUSAL TRUST
$X,XXX,XXX
Lifetime Gifts
At death of surviving spouse
Estate taxes: $0
Gifts to family
CHARITY
$X,XXX,XXX
TRUST FOR CHILDREN
At death
$X,XXX,XXX[1]
Distribution at Ages 25, 28 and 30
$X,XXX,XXX
Gifts to charity at first distribution
[1]Retirement assets distributed to family will be subject to income tax.