



Dear Beneficiary(s),

Through this document, I want to identify the values and priorities important for this transition of my life so they can be used to pursue my wishes and desires after I pass.

Legacy Priority: My top priority after I pass is providing for my family (husband and two daughters). The second priority is they learn how to be generous with the assets they come into through philanthropic endeavors.

Legacy Value: *(use this space to write down and explain your legacy value)* I feel that my legacy values align with my being a philanthropist and humanitarian.

Disposition of Assets: I desire to provide insights into my beneficiary designations and any other legal documents for the choices I have made in my last will. Disclaimer This is not a legal document and all things written are what I hope will happen in my last testament.

- It is my wish for our house in Apex to be kept for my husband so he can live there until he desires to leave. I hope any profits from the house if it is sold are saved for my daughters.
- I hope the amounts in the IRA and Roth IRA accounts will be transferred to my husband which he may keep safe until our two daughters may use it
- I wish for the employer retirement plan specifically the 401k will go to my husband which he may keep safe until our two daughters may use it.
- I have two college accounts one for each of my daughters that I hope will pay for their higher education. Should they choose to not go to college it is my desire for those funds to be donated as a scholarship for someone else to go to college
- It is my desire for the Brokerage account to be liquidized and put into the foundation set up in my name
- As the beneficiaries of my life insurance plan my husband and daughters should be able to take it at cash value and use it to pay off any expenses left in my name such as the mortgage and car payments
- The HSA account should be liquidized and it is my desire for half to be put into my foundation and the other half into a CD for my daughters to receive when they turn 30
- It is my desire for my Audi Q5 to be transferred to my youngest daughter, my valuable artwork to be given to my first daughter, and the jewelry to be split between them at their discretion.
- It is my wish that if any of my beneficiaries have a medically related problem they will receive more funds to support them through the issue.

Guiding Principle Statement (if in this transition something is not clear or does not make sense then use this set of principles to figure out how to move forward)

- It is my wish for two daughters to have equal benefits, however, my youngest daughter has a small spending problem so I desire her older sister to write off expenses over \$10,000.
- It is my wish that should my husband ever remarry all funds that he receives be saved for our daughters should he also pass.