

**PROCEEDS REMAINING**

**\* MANDATORY**

Children/Beneficiaries equally. If child/beneficiary predeceased, to: . . . . .

350.01 350.01  
A A  
B B  
C C

- A. Issue by representation. If no issue, to other children/beneficiaries or their issue
- B. Surviving children/beneficiaries equally. (Do not use with single child/beneficiary.)
- C. Issue by representation in trust. If no issue, to other children/beneficiaries or issue in trust

\* NOTE: If all children are not named as beneficiaries, select 'beneficiaries' rather than 'children', to eliminate potential for contest by unnamed child due to reference to 'children'.

\*Refer to Children or Beneficiaries?

⇒ Ch/Ben ⇒ Ch/Ben

If Children, list those named on Page 1 or do not specifically name children

⇒ P.I/No ⇒ P.I/No

If Beneficiaries, those named on Page 1 or \_\_\_\_\_

⇒ P.I/Other ⇒ P.I/Other

50% to husband's issue by representation & 50% to wife's issue by representation . . . . .

350.02 350.02

50% to husband's surviving children & 50% to wife's surviving children . . . . .

350.03 350.03

Distributed as follows: \_\_\_\_\_

350.04 350.04

(Optional) If \_\_\_\_\_ predeceased, then to: \_\_\_\_\_

Given to: \_\_\_\_\_

350.05 350.05

(Optional) Alternate: \_\_\_\_\_

Given to testamentary trustee for: . . . . .

350.06 350.06

- A. Separate trusts
- B. One common trust
- C. Trust for sole beneficiary: \_\_\_\_\_

A A  
B B  
C C

Part outright as follows: \_\_\_\_\_

350.07 350.07

Remainder to testamentary trustee for:

- A. Separate trusts
- B. One common trust
- C. Trust for sole beneficiary: \_\_\_\_\_

A A  
B B  
C C

⇒ Proceeds remaining all to surviving spouse outright, with the above distribution only effective if spouse does not survive. *This question applies only to individual trusts(s) when no 270 phrase is selected.* ⇒ Yes/No ⇒ Yes/No

**If Testamentary Trust is not applicable, proceed to p.13, End of Testamentary Trust Section.**

*If 350.01C is selected (Testamentary Trust for Contingent Beneficiary) go to 370 phrases.*

*If Testamentary Trust is selected for primary beneficiary (350.06 or 350.07), proceed to 450 phrases.*

**LONG FORM TESTAMENTARY TRUST**

370.01 370.01

*For use with phrase 350.01C if long form testamentary trust is desired for contingent beneficiary.*

- A. Separate trusts
  - B. One common trust
- Skip to 460 or 470 phrase to select specific provisions for the Testamentary Trust.*

A A  
B B

**SHORT FORM TRUST FOR YOUNG BENEFICIARY**

370.02 370.02

**If a Beneficiary under specified age\*, that beneficiary's share to be held in trust:**

- A. Guardian(s) as Trustee(s)
- B. Acting Trustee(s) to be Trustee(s)
- C. Testamentary Trustee(s) is: \_\_\_\_\_

A A  
B B  
C C

\* Specified age:

- A. all at age \_\_\_\_\_
- B. 1/2 at age \_\_\_\_\_ and 1/2 at age \_\_\_\_\_
- C. 1/3 at age \_\_\_\_\_, 1/3 at age \_\_\_\_\_, and 1/3 at age \_\_\_\_\_

A A  
B B  
C C

**Annual accounting to beneficiaries required?** (Reasonable compensation assumed)

Yes/No Yes/No

**If beneficiary deceased before trust terminates:**

- A. To issue or, if no issue, to other beneficiaries
- B. To issue or, if no issue, to siblings of deceased beneficiary
- C. To other beneficiaries
- D. To siblings of deceased beneficiary
- E. To: \_\_\_\_\_

A A  
B B  
C C  
D D  
E E

*Skip to P.13, End of Testamentary Trust Section*