

## Estate Plans and Gifts

*\*The following information should be translated into a will if you have not created one already. If you already have a will and it contains the information you would record here, then this page is unnecessary.*

*\*If this page is necessary, create as many duplicates as you need.*

Trust Location	Trustees	Trust Location	Trustees
Item		Who Should Receive This?	
Under What Circumstances is it Transferred? (death of self, spouse, or both)		Estimated Value	Date
Item		Who Should Receive This?	
Under What Circumstances is it Transferred? (death of self, spouse, or both)		Estimated Value	Date
Item		Who Should Receive This?	
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**Notes:**