

Gifts of Property *not otherwise specified in wills or trusts*

Sadly, many families are torn apart when grieving family members end-up fighting over family heirlooms, antiques, etc. The purpose of this section is to help your survivors avoid these emotional squabbles.

Specify below who gets what when “you” and “your spouse” die, or under some other circumstances you specify. **Remember**, this is not a legal document and should not be expected to replace or supersede a will or trust. Seek advice from a qualified professional as needed.

| Item's detailed description & location | To whom, when, and item's estimated value | |
|--|--|--------------------------------|
| | Who should this item go to? | |
| | Under what circumstances? <input type="checkbox"/> upon death of both "you" and "your spouse" | |
| | Item's estimated value \$ | as of mm / 4 digit year |
| | Who should this item go to? | |
| | Who should this item go to? | |
| | Under what circumstances? <input type="checkbox"/> upon death of both "you" and "your spouse" | |
| | Item's estimated value \$ | as of mm / 4 digit year |
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| | Item's estimated value \$ | as of mm / 4 digit year |
| | Who should this item go to? | |

Gifts of Property *not otherwise specified in wills or trusts* (cont'd)

| | | |
|--|--|---|
| Item's detailed description & location | To whom, when, and item's estimated value | |
| | Who should this item go to? | |
| | Under what circumstances? <input type="checkbox"/> upon death of both "you" and "your spouse" | |
| | Item's estimated value \$ | as of ____ / ____ mm 4 digit year |
| | Who should this item go to? | |
| | Under what circumstances? <input type="checkbox"/> upon death of both "you" and "your spouse" | |
| | Item's estimated value \$ | as of ____ / ____ mm 4 digit year |
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| | as of ____ / ____ mm 4 digit year | |
| | Who should this item go to? | |
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| Notes: _____ | | |
| _____ | | |
| _____ | | |
| _____ | | |