

LAST WILL AND TESTAMENT (POUR-OVER WILL)

Article I. Declaration and Revocation

I, [TESTATOR NAME], of the City of [CITY OF RESIDENCE], County of [COUNTY OF RESIDENCE], State of [STATE], being of sound mind and legal age, and not acting under duress, menace, fraud, or the undue influence of any person, do hereby make, publish, and declare this instrument to be my Last Will and Testament (this "Will"). I hereby revoke any and all prior Wills and Codicils heretofore made by me.

Article II. Identification of Family

I am a resident of the State of [STATE].

Article III. Payment of Debts, Expenses, and Taxes

I direct my to pay my just debts, the expenses of my last illness, my funeral and burial or cremation expenses, and the costs of administering my estate out of the residue of my estate or from Trust assets, as my determines most advantageous, as soon as practicable after my death. My shall not be required to pay any debt before it is legally due, and shall honor any statutory priority of payment applicable in the jurisdiction of administration (including, where applicable, Tex. Estates Code §355.001 et seq.). All estate, inheritance, succession, and similar transfer taxes payable by reason of my death shall be paid out of the residue of my estate without apportionment.

Article IV. Pour-Over Disposition to Living Trust

I give, devise, and bequeath all of the rest, residue, and remainder of my estate — including all real, personal, tangible, and intangible property of every kind and wherever situated that I own at my death, or that shall become payable to my estate or to my , and all property over which I have any power of appointment or disposition under my Will — to the then-serving Trustee of [TRUST NAME], established by me by trust instrument dated (the "Trust"), currently administered by [TRUSTEE NAME] as Trustee, to be added to, held, administered, and distributed as part of the principal of the Trust in accordance with the terms of the Trust instrument.

UTATA / Trust Amendments. This pour-over bequest is made pursuant to the Uniform Testamentary Additions to Trusts Act (or the analogous statute adopted in the State of [STATE]), and is intended to be valid notwithstanding any amendment, restatement, or modification of the Trust made by me (or by my successor) at any time before my death. The Trust shall be identified and administered as so amended, restated, or modified, and my bequest shall pour into the Trust as then in effect.

Section 4.2 Fallback Disposition

If, for any reason, the Trust is not in existence at the time of my death, or is held by a court of competent jurisdiction to be invalid or to have been revoked, or is otherwise unable to receive the bequest made in this Article, then the bequest shall not fail. Instead:

The property that would otherwise have passed to the Trust shall pass to my heirs at law as determined under the intestate-succession laws of the State of [STATE] in effect at my death, as if I had died intestate, the Trust having never existed.

This fallback is intended to prevent my estate from lapsing or from being subject to unintended intestacy by reason of a Trust failure, and is a testamentary trust to the extent necessary to carry out my intent.

Article V. Nomination of

I nominate [EXECUTOR NAME] of [EXECUTOR CITY STATE] and [COEXECUTOR NAME] of [STATE] to serve as Co-s of my estate. The Co-s shall act jointly; however, either Co- may act alone with respect to ministerial matters, routine account transactions, and any matter on which the Co-s have previously agreed in writing. If the Co-s are unable to agree on a material matter, the decision of the Co-named first above shall control, provided that any affected beneficiary retains the right to seek court review.

If **** is also unable or unwilling to serve, I nominate [SECOND ALTERNATE EXECUTOR NAME] as further successor .

Bond waived. I direct that no bond or other security shall be required of any named in this Will, in any jurisdiction in which such waiver is permitted by law.

Section 5.2 Independent Administration

To the fullest extent permitted by the laws of the State of [STATE], I authorize my to administer my estate as an independent or through informal, unsupervised, or summary administration, without the requirement of court supervision other than as strictly required by law. This includes, without limitation, independent administration under Tex. Estates Code §401.001 et seq. (Texas); informal probate under 755 ILCS 5/28-1 et seq. (Illinois); informal probate under M.G.L. c. 190B §3-301 et seq. (Massachusetts); and any equivalent simplified procedure available in any other jurisdiction in which my estate is administered.

Article VI. Powers of

My , in addition to other powers and authority granted by law or necessary or appropriate for proper administration of my estate, shall have the right and power to retain, lease, sell, exchange, mortgage, pledge, or otherwise encumber any real or personal property that may be included in my estate, to invest and reinvest, to settle claims, to compromise disputes, to continue any business, and to exercise any and all fiduciary powers granted by the laws of the State of [STATE] to personal representatives, in each case

without order of court and without notice to any beneficiary, to the fullest extent permitted by law. My may delegate ministerial functions and may retain and compensate attorneys, accountants, appraisers, and other professionals out of the estate.

Section 6.2 Digital Assets (RUFADAA)

I expressly grant my the fullest authority permitted under the Revised Uniform Fiduciary Access to Digital Assets Act as enacted in the State of [STATE], and under any equivalent state or federal law, to access, control, manage, and dispose of my digital assets and the content of my electronic communications. "Digital assets" includes, without limitation: email and messaging accounts; social-media accounts; cloud-storage accounts; online financial and payment accounts; cryptocurrency and other digital-currency wallets, keys, and accounts; domain names; online subscription services; digital photographs, videos, and documents; and any user-account or electronic record that I have the right to access or control. My is authorized to obtain, bypass, reset, or override passwords, security questions, two-factor authentication, and other access controls to the extent legally permitted, and custodians of such assets are hereby directed to disclose to my the content of communications and the catalog of my digital assets as permitted by law.

Article VIII. General Provisions

Survivorship. No person or entity shall be deemed to have survived me under this Will unless such person or entity survives me by at least 30th (30) days. Any beneficiary failing to so survive me shall be deemed to have predeceased me for all purposes of this Will, and any property that would otherwise have passed to such beneficiary shall pass as provided herein as if such beneficiary had predeceased me.

Simultaneous Death. If any beneficiary and I die under circumstances in which the order of death cannot be established by clear and convincing evidence, I shall be deemed to have survived such beneficiary for all purposes of this Will, consistent with the Uniform Simultaneous Death Act as enacted in the State of [STATE].

Severability. If any provision of this Will is held invalid or unenforceable for any reason, the remaining provisions shall continue in full force and effect, and the invalid provision shall be construed or reformed to the minimum extent necessary to preserve my intent.

Governing Law. This Will shall be governed by and construed in accordance with the laws of the State of [STATE].

Gender and Number. Words of any gender include all genders, and words in the singular include the plural and vice versa, as the context requires.

Section 8.4 Compliance and Tax Disclosure

Federal estate-tax notice. Under current federal law (26 U.S.C. §2010, as amended by the Tax Cuts and Jobs Act of 2017), the federal estate-tax exemption is scheduled to be reduced after December 31, 2025. My is authorized, and is encouraged, to consult with qualified estate-planning counsel promptly after my death to review current exemption levels and tax-minimization opportunities applicable to my estate.

Article IX. Execution

IN WITNESS WHEREOF, I have subscribed my name below, declaring this to be my Last Will and Testament, consisting of the pages preceding this signature, on this , at [CITY OF RESIDENCE], [STATE].

Testator

PRINTED NAME

SIGNATURE

DATE

Article X. Attestation by Witnesses

We, the undersigned witnesses, certify that the above instrument was signed, published, and declared by [TESTATOR NAME] (the "Testator") as the Testator's Last Will and Testament in our sight and presence, and we, at the Testator's request and in the Testator's sight and presence, and in the sight and presence of each other, subscribe our names as witnesses on the date first written above. Each of us is over the age of majority, and to the best of our knowledge the Testator is of sound mind, is under no constraint or undue influence, and is signing the Will as the Testator's free and voluntary act.

INTERESTED-WITNESS NOTICE. No witness should be a beneficiary under this Will or the Trust. In most states, a gift to an interested witness is purged to that witness's intestate share unless the Will is also attested by the statutory number of disinterested witnesses.

Witness 1

PRINTED NAME

SIGNATURE

DATE

Witness 2

PRINTED NAME

SIGNATURE

DATE

Self-Proving Affidavit

State of [STATE] County of [COUNTY OF RESIDENCE]

Before me, the undersigned notary public, on this day personally appeared [TESTATOR NAME] (the "Testator") and the witnesses whose names are subscribed above, known to me (or proved to me on the basis of satisfactory evidence consisting of _____) to be the persons whose names are subscribed to the foregoing instrument in their respective capacities. All of said persons, being by me duly sworn, declared to me that:

1. The foregoing instrument is the Last Will and Testament of the Testator;
2. The Testator willingly signed, or directed another to sign for the Testator, the instrument as the Testator's free and voluntary act for the purposes therein expressed;
3. Each witness, in the presence and hearing of the Testator, signed the Will as a witness;
4. To the best of each witness's knowledge, the Testator was, at the time of execution, eighteen (18) years of age or over (or, where applicable under state law, was lawfully married or was then a member of the armed forces of the United States or an auxiliary thereof, or of the Maritime Service), of sound mind, and under no constraint or undue influence; and
5. Each witness was at the time of execution at least fourteen (14) years of age (or such greater age as required by applicable state law) and was a competent witness.

Subscribed, sworn to, and acknowledged before me by the Testator, and subscribed and sworn to before me by the witnesses, on .

Notary Public, State of [STATE] My commission expires: _____ [Notary Seal]