

Additional sub-trust for a beneficiary not inheriting directly.

Name of beneficiary who should not inherit directly:

Please tell us who should manage the funds and make decisions about distributions (be sure to list at least four (4) individuals, in order of preference):

1.

2.

Name: _____

Relationship: _____

Address: _____

3.

4.

Name: _____

Relationship: _____

Address: _____

When trust terminates: _____ death or when trust assets depleted _____