

Instructions to my Executors and Guardian

These instructions are meant to communicate my directions and personal desires to my family and my executors, trustees, and guardians in handling certain matters. However, the thoughts expressed in these instructions should not be considered rigid or binding, and they should always be considered only after careful deliberation of the facts and circumstances existing when a decision is made.

These instructions are not intended as a Will, and if anything included in these instructions conflict with the provisions of my Will or Trust, the provisions of my Will or Trust shall prevail.

Funeral and Burial Instructions

The following are my wishes concerning my funeral and burial arrangements and last rites:

Cremation - use my ashes to grow a tree

Guidance for Executors

The following are clarifying instructions for my executor. Nothing in these instructions shall be considered binding as they are merely an expression of my thoughts and feelings that I wish to convey to my executor as guidance in their duties.

Please pay for family to travel to my funeral

Signed: _____
Isaac Morgan

Dated: _____



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Guidance for Trustees

The following are clarifying instructions for trustees. Nothing in these instructions shall be considered binding as they are merely an expression of my thoughts and feelings that I wish to convey to my trustees as guidance in their duties.

I have placed a checkmark (✓) next to items that I would like my trustees to consider providing for my beneficiaries as part of their “health, education, maintenance, and support (HEMS):”

Health

_____ All items below, as well as any other items the trustee, in their discretion, deems to be necessary for the health of the beneficiary, or

Select individual items:

- _____ healthcare, dental, vision insurance premiums, and deductibles
- _____ eye care, glasses, contact lenses, vision correction surgery
- _____ regular medical treatments, checkups, and exams
- _____ allergen services
- _____ restorative cosmetic surgeries
- _____ alternative therapeutic medical treatments (e.g., acupuncture, massage therapy, etc.)
- _____ substance abuse rehabilitation programs
- _____ vacations or retreats to improve mental health
- _____ health-related home improvements or renovations
- _____ home health care or long-term care
- _____ health clubs, gym, spa, golf club memberships
- _____ exercise equipment
- _____ healthcare supplements
- _____ mental health counseling & treatments
- _____ handicap-related equipment, transport and mobility services
- _____ Other _____
- _____
- _____



Education

_____ All items below, as well as any other items the trustee, in their discretion, deems to be necessary for the education of the beneficiary, or

Select individual items:

- _____ tuition for all levels of public or private schools
- _____ graduate or professional degrees including medical school, law school, etc.
- _____ study-abroad programs and related travel expenses
- _____ a beneficiary’s support between semesters or during unpaid internships
- _____ school-related expenses including room, board, books, computer, uniforms etc.
- _____ private tutoring
- _____ extracurricular activities related to the education experience
- _____ certification and graduation costs
- _____ career counseling and training
- _____ daycare for dependents to allow a parent time to attend classes and study
- _____ Other _____

Maintenance and Support

_____ All items below, as well as any other items the trustee, in their discretion, deems to be necessary for the maintenance and support of the beneficiary, or

Select individual items:

- _____ rent or mortgage payments or subsidy to live near work or school
- _____ down payment on a home
- _____ study-abroad programs and related travel expenses
- _____ living expenses and support for a beneficiary engaged in charitable work or low-income vocations that provide social and community benefits
- _____ insurance premiums including life, auto, disability, or homeowner’s policies
- _____ vehicles and related repairs and maintenance
- _____ continuation of family gifting for birthdays, weddings, holidays, baby showers, etc.



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- _____ travel for family events (funerals, support, weddings, etc.)
- _____ legal fees
- _____ continuation of typical family vacations
- _____ home repair and maintenance
- _____ mobile phone service and equipment
- _____ utility bills, such as electricity, water, television, internet, streaming etc.
- _____ seed money to start a business
- _____ Other _____
- _____
- _____

Signed: _____
Isaac Morgan

Dated: _____



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