

**Last Will and Testament  
of  
Vanessa Morgan**

I, Vanessa Morgan, a resident of the State of California, being of sound and disposing mind, do freely declare this to be my Last Will and Testament. I expressly revoke any and all of my prior wills and codicils made by me. All references to “my Will” refer only to this Last Will and Testament.

**Family Members**

I am married to Isaac Morgan.

The names of my children are listed below. Unless otherwise specifically indicated in my Will, any provision for my children includes the children named below, as well as any child of mine hereafter born or adopted.

Naomi Morgan  
Alexis Morgan  
Jonas Morgan

**Tangible Personal Property**

I may prepare a memorandum, signed by me, directing the disposition of my interests in certain tangible personal property. My memorandum or other similar writing directs how I give all my tangible personal property and any insurance policies covering the property and any claims under those policies. Tangible personal property not specifically disposed of in that memorandum or elsewhere in this Will shall pass as a part of the residue of my estate. If I leave multiple written memoranda, the memorandum with the most recent date will control. To the extent such memorandum is not valid in the state in which I reside at the time of my death, or to the extent any property listed on such memorandum is not subject to the law regarding such memorandum, I request that my executor and beneficiaries honor my wishes as expressed in the memorandum.

Any and all specific distributions shall include any insurance policies on the property and any claims under those policies.

Any specific distribution of tangible personal property to a minor may be delivered to the person who is a parent or the legal guardian of the minor.

**Specific Distributions**

If Isaac Morgan has predeceased me, I leave a monetary distribution of \$10,000.00 to each of my grandchildren living at the time of my death.



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If any beneficiary of a distribution under this section is under the age of 18 at the time of my death, the beneficiary's share shall be held and administered in trust under the following terms:

- As to each beneficiary, the trustee shall be the parent of the beneficiary who is also my descendant. If that person cannot serve as trustee, then my executor shall be trustee.
- The trustee shall distribute all the net income of a beneficiary's trust to the beneficiary not less frequently than annually.
- The trustee shall distribute to the beneficiary, or for the beneficiary's benefit, as much of the principal as the trustee deems necessary for the beneficiary's health, education, maintenance, and support.
- When the beneficiary reaches the age of 18, the trustee shall distribute any accumulated income and principal to the beneficiary.
- If the beneficiary dies after the beneficiary's trust is established, but before the entire distribution of the beneficiary's trust, the trustee shall distribute the beneficiary's remaining interest in trust property to the beneficiary's descendants, per stirpes, to be administered under the same terms as the beneficiary's trust. If the beneficiary has no then living descendants, the trustee shall distribute the beneficiary's remaining interest in trust property to the beneficiary's heirs at law, to be administered under the same terms as the beneficiary's trust.

I leave the following item described as "Vanessa's Engagement Ring" to Alexis Morgan, outright. If Alexis Morgan predeceases me, I leave this distribution to Naomi Morgan.

### **Bequest to Isaac Morgan**

If Isaac Morgan survives me, I leave the remainder of my estate after specific distributions, if any, have been satisfied to the "Isaac Morgan Trust," to be administered as follows:

- I name Isaac Morgan as trustee. If Isaac Morgan dies or ceases to serve, I name Rosa Nunez and Brandon Morgan as co-trustees. If a co-trustee dies or ceases to serve, the survivor(s) shall serve.
- The trustee shall distribute all the net income of the Isaac Morgan Trust to Isaac Morgan not less frequently than annually during the lifetime of Isaac Morgan.
- The trustee shall distribute to Isaac Morgan as much of the principal of the Isaac Morgan Trust as the trustee deems necessary for the health, education, maintenance, and support of Isaac Morgan.
- The trustee shall convert any unproductive property held in the Isaac Morgan Trust to productive property upon a request by Isaac Morgan in writing.
- The Isaac Morgan Trust shall terminate upon the death of Isaac Morgan and the trustee shall administer the remainder of the Isaac Morgan Trust as provided in the Section below.



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### Estate Beneficiaries

On the termination of the Isaac Morgan Trust or if Isaac Morgan predeceases me, I leave the remainder of my estate after specific distributions, if any, have been satisfied to Naomi Morgan and Alexis Morgan and Jonas Morgan (“the remainder beneficiaries”), in equal portions, per stirpes. When a distribution is to be made to my beneficiaries per stirpes, the distribution will be divided into as many equal shares as there are then-living beneficiaries, and deceased beneficiaries of me who left then-living descendants. Each then-living beneficiary will receive one share and the share of each deceased beneficiary will be divided among the deceased beneficiary’s then-living descendants in the same manner.

The portion for Naomi Morgan shall be distributed to a separate trust for the benefit of Naomi Morgan, in the portion set forth hereinabove. The trust shall be administered as follows:

- I name Brandon Morgan as trustee. If Brandon Morgan dies or ceases to serve, I name Rosa Nunez as trustee.
- The trustee shall distribute all the net income of the beneficiary’s trust to the beneficiary not less frequently than annually.
- The trustee shall distribute to the beneficiary, or for the beneficiary’s benefit, as much of the principal as the trustee deems necessary for the beneficiary’s health, education, maintenance, and support.
- If the beneficiary dies after the beneficiary’s trust is established, but before the entire distribution of the beneficiary’s trust, the trustee shall distribute the beneficiary’s remaining interest in trust property to the beneficiary’s descendants, per stirpes, to be administered under the same terms as the beneficiary’s trust. If the beneficiary has no then living descendants, the trustee shall distribute the beneficiary’s remaining interest in trust property to the beneficiary’s heirs at law, to be administered under the same terms as the beneficiary’s trust.
- When the beneficiary has reached one or more of the following ages, or if the beneficiary has already reached one of the following ages upon the funding of the trust established for the beneficiary, the trustee shall distribute to the beneficiary: 1/3 of the accumulated trust income and principal after reaching 25 years of age; 1/2 of the remaining accumulated trust income and principal after reaching 35 years of age; and the remainder of the accumulated trust income and principal after reaching 45 years of age.

The portion for Alexis Morgan shall be distributed to a separate trust for the benefit of Alexis Morgan, in the portion set forth hereinabove. The trust shall be administered as follows:

- I name Brandon Morgan as trustee. If Brandon Morgan dies or ceases to serve, I name Rosa Nunez as trustee.
- The trustee shall distribute all the net income of the beneficiary’s trust to the beneficiary not less frequently than annually.



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- The trustee shall distribute to the beneficiary, or for the beneficiary's benefit, as much of the principal as the trustee deems necessary for the beneficiary's health, education, maintenance, and support.
- If the beneficiary dies after the beneficiary's trust is established, but before the entire distribution of the beneficiary's trust, the trustee shall distribute the beneficiary's remaining interest in trust property to the beneficiary's descendants, per stirpes, to be administered under the same terms as the beneficiary's trust. If the beneficiary has no then living descendants, the trustee shall distribute the beneficiary's remaining interest in trust property to the beneficiary's heirs at law, to be administered under the same terms as the beneficiary's trust.
- When the beneficiary reaches the age of 30, or if the beneficiary has already reached the age of 30 upon creation of the trust, all accumulated trust income and principal shall be distributed to the beneficiary.

The portion for Jonas Morgan shall be distributed to a separate trust for the benefit of Jonas Morgan, in the portion set forth hereinabove. The trust shall be administered as follows:

- I name Brandon Morgan as trustee. If Brandon Morgan dies or ceases to serve, I name Rosa Nunez as trustee.
- The trustee shall distribute all the net income of the beneficiary's trust to the beneficiary not less frequently than annually.
- The trustee shall distribute to the beneficiary, or for the beneficiary's benefit, as much of the principal as the trustee deems necessary for the beneficiary's health, education, maintenance, and support.
- If the beneficiary dies after the beneficiary's trust is established, but before the entire distribution of the beneficiary's trust, the trustee shall distribute the beneficiary's remaining interest in trust property to the beneficiary's descendants, per stirpes, to be administered under the same terms as the beneficiary's trust. If the beneficiary has no then living descendants, the trustee shall distribute the beneficiary's remaining interest in trust property to the beneficiary's heirs at law, to be administered under the same terms as the beneficiary's trust.
- The trust shall terminate at the trustee's discretion, after taking into account the demonstrated ability of the beneficiary to handle money and property wisely, the judgment, the prudence, and discretion of the beneficiary, and any other factors the trustees may consider relevant.

### **Executor**

I name Isaac Morgan as executor. If Isaac Morgan dies or ceases to serve, I name Rosa Nunez as executor. If Rosa Nunez dies or ceases to serve, I name Brandon Morgan as executor.

I authorize my executor to exercise all powers without court supervision under the independent administration rules of any state where a probate may be necessary. To the maximum extent permissible under law, my executor shall not be required to post bond, security, or surety.



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My executor shall have the power to access, handle, distribute, and dispose of digital assets. "Digital assets" includes files stored on digital devices, including but not limited to, desktops, laptops, tablets, peripherals, storage devices, mobile telephones, smartphones, and any similar digital device which currently exists or may exist as technology develops or such comparable items as technology develops. The term "digital assets" also includes but is not limited to emails received, email accounts, digital music, digital photographs, digital videos, software licenses, social network accounts, file sharing accounts, financial accounts, domain registrations, DNS service accounts, web hosting accounts, tax preparation service accounts, online stores, affiliate programs, other online accounts and similar digital items which currently exist or may exist as technology develops or such comparable items as technology develops, regardless of the ownership of the physical device upon which the digital item is stored.

Reference to my executor includes any alternate or successor executor or co-executors, however named or appointed. Except as otherwise stated herein, if there are two or more executors, the powers conferred upon them may be exercised by a majority of them.

### **Guardian**

I name Isaac Morgan as the guardian of my minor children existing at the time of my death. If Isaac Morgan dies or ceases to serve, I name Rosa Nunez as guardian. To the maximum extent permissible under law, any guardian named herein shall not be required to post bond, security, or surety.

### **Testamentary Trust Administrative Provisions**

The interest of each beneficiary shall be held subject to a "spendthrift trust" and shall be subject to the maximum spendthrift restraints permitted by law.

If there is a vacancy in the office of trustee, then the beneficiaries, by majority, may appoint a successor trustee in writing.

The trustee shall have and possess and may exercise all of the rights, powers, and authorities incident to the office of trustee or required in and convenient for the discharge of the trust or impliedly conferred or vested in the trustee under the laws of California or any other jurisdiction whose law applies to my Will.

The trustee shall have, in the investment and reinvestment and administration of the securities and property forming the corpus of this trust, the widest latitude and authority permitted by California law.

The trustee is authorized to accept and retain any property donated to this trust for as long a period of time as the trustee may think proper, even though such property is of a kind or in an amount that ordinarily would not be considered suitable for trust investments.



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The trustee is authorized to select an attorney for the trust created herein and may employ a certified public accountant to prepare tax returns due by the trust.

The trustee may pay for the trust all taxes due by the trust and any and all expenses incurred in connection with the administration thereof, such as fees for the preparation of income tax returns, legal fees, compensation of the trustee, periodic accountings, or any other expenses. All such compensation and any charges payable by the trust shall be charged against income to the extent income is available and any excess charged against principal.

Anyone dealing with the trustee in good faith may rely upon any statement of fact certified by the trustee.

### **Miscellaneous Provisions**

If any legal heir of mine, any person claiming under any such heir, or any other person, directly or indirectly, contests or attacks this Will or any of its provisions, or conspires with or assists anyone in any such contest, or pursues any creditor's claim that my Executor reasonably deems to constitute a contest, any share or interest in my estate is revoked and shall be disposed of as if the contesting beneficiary had predeceased me without descendants, and shall augment proportionately the shares of my estate passing to or in trust for my beneficiaries who have not participated in such acts. This Article shall not apply to a disclaimer. Expenses to resist a contest or other attack of any nature shall be paid from my estate as expenses of administration.

If any part of my Will is determined to be void or invalid, the remaining provisions will continue in full force and effect.

From that property not specifically bequeathed, my executor shall have full power and discretion to select particular properties, groups of properties, or classifications of properties to satisfy any other bequest.

Unless otherwise specified in this Will, if a beneficiary is under the age of eighteen (18) at the time of my death, that beneficiary's inheritance shall be held in trust, with my executor as their trustee, until the beneficiary attains the age of eighteen (18). The trustee may distribute to the beneficiary, or expend for their benefit, so much of the beneficiary's inheritance, at such time or times and in such amounts and manner as the trustee, in their discretion, shall determine to be necessary for the beneficiary's health, education, maintenance, or support. This trust will be subject to the Testamentary Trust Administrative Provisions contained in this Will.



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I, the undersigned, Vanessa Morgan, do hereby declare that I am eighteen years of age or older, of sound mind, under no constraint or undue influence, and that I sign and execute this instrument as my Last Will and Testament, that I sign it willingly, or willingly direct another to sign for me, and that I execute it as my free and voluntary act for the purposes herein expressed, on this \_\_\_\_\_ (MM/DD/YYYY).

\_\_\_\_\_  
Vanessa Morgan

Each of us declares under penalty of perjury under the laws of the State of California that the following is true and correct:

- a) On the date written below, the maker of this Will declared to us that this instrument was the maker's Will and requested us to act as witnesses to it;
- b) We understand this is the maker's Will;
- c) The maker signed or acknowledged this Will in our presence, all of us being present at the same time;
- d) We now, at the maker's request, and in the maker's and each other's presence, sign below as witnesses;
- e) We believe the maker is of sound mind and memory;
- f) We believe that this Will was not procured by duress, menace, fraud or undue influence;
- g) The maker is age 18 or older; and
- h) Each of us is now competent to be a witness and resides at the address set forth after our name.

\_\_\_\_\_  
First Witness (sign and print name)

\_\_\_\_\_  
Date of First Witness Signature

\_\_\_\_\_  
First Witness Home Address

\_\_\_\_\_  
Second Witness (sign and print name)

\_\_\_\_\_  
Date of Second Witness Signature

\_\_\_\_\_  
Second Witness Home Address



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**Tangible Personal Property Memorandum  
of  
Vanessa Morgan**

I, Vanessa Morgan, executed my Last Will and Testament on \_\_\_\_\_ (MM/DD/YYYY), which refers to a memorandum directing the disposition of my interests in certain tangible personal property not otherwise specifically disposed of by my will. This memorandum is made for that purpose.

If the designated recipient of a particular item of tangible personal property does not survive me, the item shall be disposed of as though I did not list it in this memorandum.

To the extent this memorandum is not valid in the state in which I reside at the time of my death, or to the extent any property listed on this memorandum is not subject to the law regarding such memorandum, I request that my executor and beneficiaries honor my wishes as expressed in this memorandum. If I leave multiple written memoranda, the memorandum with the most recent date will control.

<b>Description of Tangible Personal Property</b>	<b>Recipient's Name, Address, Relationship</b>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Signed: \_\_\_\_\_  
Vanessa Morgan

Dated: \_\_\_\_\_



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