

**WORKSHEET FOR MARRIED COUPLE WITHOUT CHILDREN
NO REVOCABLE ("LIVING") TRUST PLAN**

Selection of representatives and agents: Please put down the name, address, and date of birth of a person named, the first time the person's name appears. Include middle initials, Jr., Sr. and III, if normally used by the person. If Wills are going to be identical in some regards, put "same" under Wife's Documents. Indicate whether representatives or agents named serve together (e.g., "co-Personal Representative" -- usually not advisable), or, if someone is named as an alternative or successor, what your preferred priority is for that person (e.g., "first alternate Patient Advocate").

In Husband's Documents (left column)

In Wife's Documents (right column)

I want the following persons to serve as Personal Representatives (indicate one person, or, less desirably, two or more co-personal representatives):

If they are unable or unwilling to serve, then (name one or more alternate personal representatives or co-alternate personal representatives, and indicate their priority, e.g., "first alternate P.R." and "second alternative P.R." if you wish to have an extra back-up):

As Testamentary Trustees of a testamentary trust for minors or disabled persons (not your children or wards):
