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**Estate Planning Portfolio**  
**For**  
**John Aaron Smith**

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This portfolio serves as a recordkeeping system for your estate plan: it contains every document that your successor Trustees and agents will need to follow your instructions. The portfolio is organized as follows:

<b>Introduction</b>	Information about your estate planning portfolio.
<b>Overview</b>	A written summary or diagram of your Revocable Living Trust plan.
<b>Revocable Living Trust</b>	Your Revocable Living Trust, as most recently amended or restated.
<b>Will</b>	Your Will that transfers to your Revocable Living Trust any assets that you do not transfer to it during your life.
<b>Nominations</b>	Names of persons appointed to act on your behalf in various capacities.
<b>Personal Information</b>	The most recent personal and financial information that you have provided to us.
<b>Funding Instructions</b>	Instructions that explain how to transfer your assets to your Revocable Living Trust and how to name your Revocable Living Trust as your beneficiary.
<b>Power of Attorney</b>	A document that authorizes your agent to transfer property to your Revocable Living Trust and manage your financial affairs if you become unable to manage them yourself.
<b>Certificate of Trust</b>	A document that you can give to financial institutions and others when they request a copy of your Revocable Living Trust. This keeps the personal and financial information in your Revocable Living Trust private.
<b>Trust Assets</b>	Proof of every asset transfer to your Revocable Living Trust and every designation of your Revocable Living Trust as your beneficiary.
<b>Health Care</b>	Your Authorization for Release of Protected