

Top Summary

Grantor **John Adamson**

Trustees **John Adamson**

Successor Trustees **Jake Adamson**

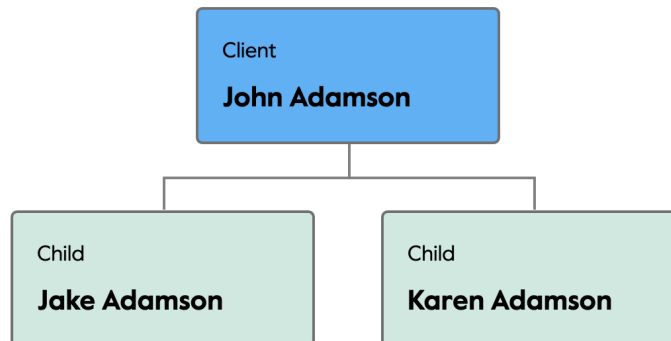
Executor **Jake Adamson**

Successor Executors

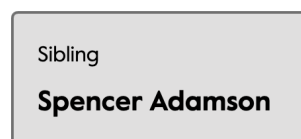
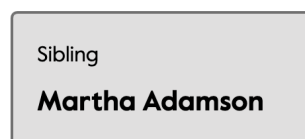
Legal Guardians

Family Tree

State of residence **New York**




Others



Power of Attorney - John Adamson

Signed 10/06/2017


Agent's name	Jake Admason (Page I, Article One(Section I.OI))
Successive agents	N/A
Is it springing?	Yes (Page I, Article Two(Section 2.OI))
Can the agent make gift and other tax-related decisions?	Yes (Page IO , Section 3.20 - Taxes)
State	New York (Page I3, Section 5.O8) 

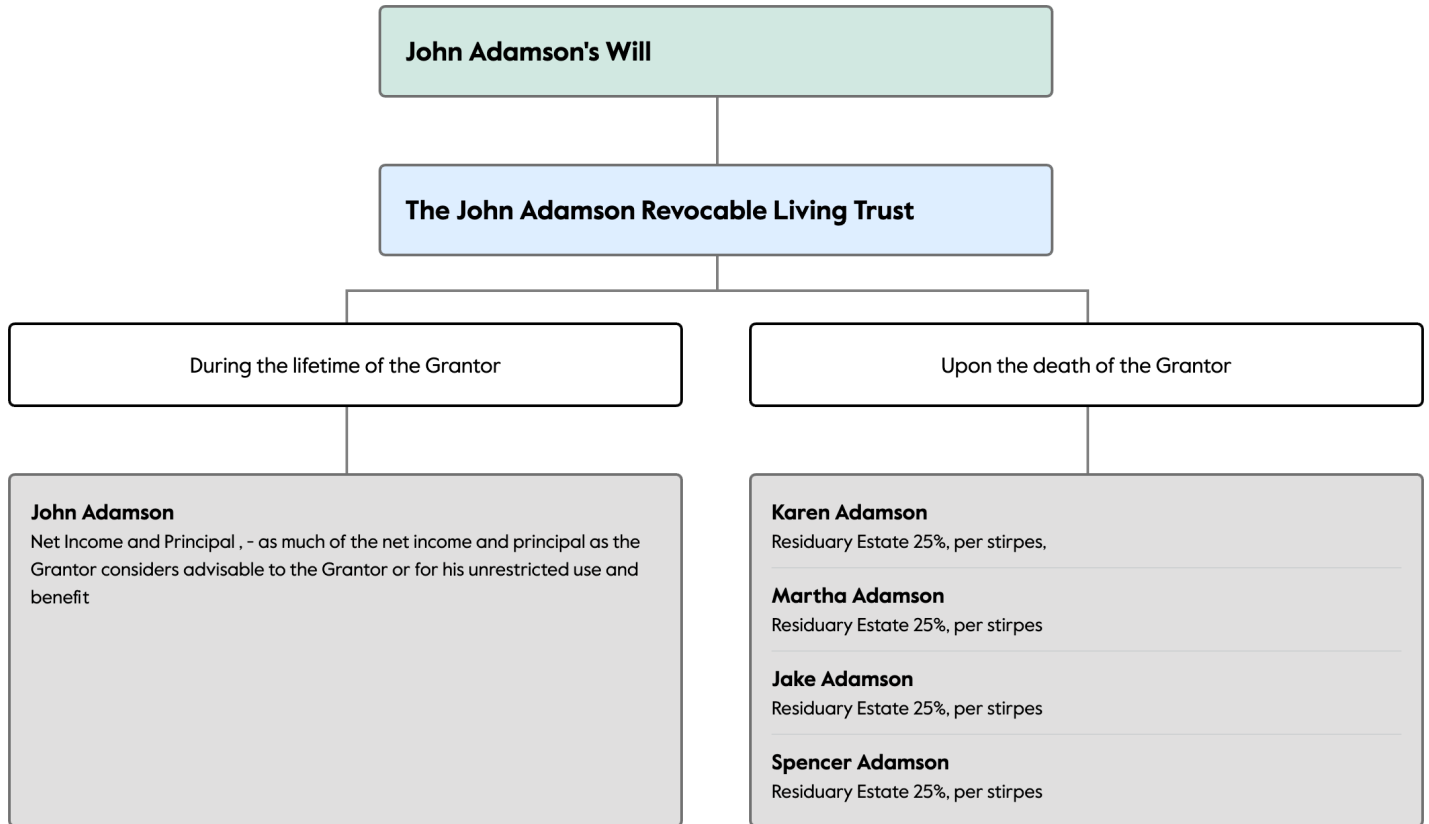
Material information

Article Four of the POA expressly mentions that the agent does not have the power to make a gift.

Health Care Directive

Signed 10/06/2017

Health Care POA Principal	John Adamson
Health Care POA Agent	Jake Adamson (Page 2, Part I (B) My Agent)
Health Care POA Successive Agents	N/A
HIPAA Paragraph	Yes (Pages 2 and 3, Part I(Clause C))
State	New York (Page 8, Signatures) 



John Adamson's Will

1. The last will and testament of John Adamson has been executed on 6th October 2017. John nominates Jake as his Personal Representative. If Jake is unwilling or unable to act as John's Personal Representative, John nominates the person or persons serving as Trustee of the John Adamson Revocable Living Trust dated October 6, 2017 to serve as John's Personal Representative. (Page 2, Article Three(Section 3.01))
2. John directs that his Personal Representative distribute his tangible personal possessions according to a separate Personal Property Memorandum or other similar writing signed by him and kept with his personal records. The writing will qualify to distribute his tangible personal possessions under applicable state law. If the writing is not found at the time of his death, or is ruled an improper disposition, this bequest will lapse and his tangible personal possessions will become part of his Revocable Living Trust. If any items of tangible personal property she owns are not mentioned in the writing, those items will become part of her Revocable Living Trust. If any gift of tangible personal property lapses, then the items comprising the lapsed gift will become part of her Revocable Living Trust. (Pages 1 and 2, Article Two(Section 2.01))
3. John gives all of his probate estate, excluding any property over which she has a power of appointment, after expenses and taxes are paid under this Will, to the then-acting Trustee of the John Adamson Revocable Living Trust dated October 6, 2017 and executed before this Will, to be added to the property of that trust. John directs that the Trustee administer the property according to the trust and any amendments made prior to his death. (Page 2, Article Two(Section 2.02))
4. If the trust referred to in Section 2.02 is not in effect at John's death, or if for any other reason the pour over fails, John specifically incorporates by reference all the terms of the trust into this Will. John directs his Personal Representative to then establish a new trust under the provisions of that trust and distribute the remainder of his estate, excluding any property over which she has a power of appointment, to that Trustee to administer as provided in the trust. (Page 2, Article Two(Section 2.03))
5. The Will document also provides for a Survivorship Clause.

The John Adamson Revocable Living Trust
 Dated Oct 6th, 2017

Trustee John Adamson
Successor Trustee Jake Adamson

I. The John Adamson Revocable Living Trust was created on October 6th, 2017. The trustee of the trust is John Adamson and the successor trustee is Jake Adamson. (Page I, Introduction)

2. During the lifetime of the Grantor, the Grantor retains the right to control the distribution of income and principal from the Grantor's trust. The Grantor may direct his Trustee to distribute as much of the net income and principal of the trust property as she considers advisable to himself or to other persons or entities. The Trustee may distribute the net income and principal to the Grantor or for his unrestricted use and benefit, even to the exhaustion of all trust property. (Page 2, Article One(Section 1.04)(d))

3. During the incapacity of the Grantor, the Trustee shall regularly and conscientiously make appropriate distributions of the net income and principal for the Grantor's general welfare and comfort under the circumstances existing at the time those distributions are made. The Trustee may make distributions for the Grantor's benefit in any one or more of the following ways : to the Grantor, to the extent the Grantor is able to manage these distributions; to other persons and entities for the Grantor's use and benefit; to an agent or attorney in fact authorized to act for the Grantor under a legally valid durable power of attorney executed by the Grantor prior to the Grantor's incapacity; and to the guardian or conservator, who has assumed responsibility for the Grantor under any court order, decree, or judgment issued by a court of competent jurisdiction. (Page 5, Article Four(Section 4.01))

4. Upon the death of the Grantor, the Grantor may dispose of items of tangible personal property by a signed written memorandum executed after the Grantor signs this instrument. The memorandum must refer to the Grantor's trust and must reasonably identify the items and the beneficiary designated to receive each item. If the Grantor executes a memorandum, the Trustee shall incorporate the memorandum by reference into this instrument to the extent permitted by law. The Trustee shall distribute the items of tangible personal property listed in the memorandum as promptly as practicable after the Grantor's death, together with any insurance policies covering the property and any claims under those policies, as provided in the memorandum. The Trustee shall distribute any remaining tangible personal property not disposed of by a written memorandum under the remaining terms of this instrument. (Pages 7 and 8, Article Six(Section 6.01 and Section 6.02))

5. The trustee shall distribute the remaining property outright and free of trust to the Grantor's descendants, per stirpes. If a share is to be distributed to an incapacitated beneficiary or a beneficiary under the age of 21, the Trustee shall hold or distribute the share as provided in Article Nine. (Page 8, Article Seven)

6. Article Eight provides for the Remote Contingent Distribution. The document also contains Spendthrift provision, Contest Provisions and Survivorship Presumption.

