

I have created several documents describing our "Estate Planning", and stored them on my server (one is too big to e-mail as an attachment). You should be able to download them from a browser. There are copies in this "Emergency Information" folder on my (Ruby) desktop. The documents are:

- 1) <http://www.spacetimelinks.com/jfbmisc/Emergency%20Folder/EstateInstructions.pdf>
- 2) [http://www.spacetimelinks.com/jfbmisc/Emergency%20Folder/Trust\\_Q&A%20Brenner.pdf](http://www.spacetimelinks.com/jfbmisc/Emergency%20Folder/Trust_Q&A%20Brenner.pdf)
- 3) <http://www.spacetimelinks.com/jfbmisc/Emergency%20Folder/TrustDocuments.pdf>

If these links do not appear "live", try copy/paste them into the browser.

Item 1) is my general introduction to the whole plan, with key contact information, as well as login information needed to access bank accounts, annuities, TIAA, etc. Some of the information has changed because some sites require me to create new passwords on a regular basis. I will update this information periodically.

Item 3) is the set of trust documents as they stand at present. This is a docx file consisting of scans of the original documents as they exist in a loose-leaf binder which I have, and a duplicate copy in the hands of the lawyer, Stephen T DiGregorio. This is a large file since the contents are jpeg images inserted into a docx file. Much of the information is currently missing since I have not had time to go through the transfer of the house ownership to the trust. I will be trying to get this settled in the next month or so. It is complicated since I have to redo the HELOC and deed the property to a lawyer, who then deeds it over to the Trust. I also have to change the ownership on the home insurance, real estate taxes, etc.

Item 2) is a set of questions that I had for the lawyer when we first set this up. I provide it just in case you are as confused by some of the Legalese as I was. I wrote up a set of questions/comments, and added Steve's responses in blue. This only exists in pdf file, which is how I saved it from e-mail. I tried converting it to Word, but it didn't work too well.

No rush, but if you see anything that doesn't make sense, let me know. We can also get together to go over any tricky parts.

Love, Mom and Dad