

# POUR OVER WILL

Date (the “Effective Date”): \_\_\_\_\_

State: \_\_\_\_\_

County: \_\_\_\_\_

I, \_\_\_\_\_ (the “Testator”), residing at \_\_\_\_\_, date of birth: \_\_\_\_\_, Social Security Number: \_\_\_\_\_, being of sound mind and in the contemplation of the certainty of death, do hereby declare this Pour Over Will (the “Will”) to be my last will and testament:

## DISTRIBUTION OF ESTATE:

I give all of my estate to the then-acting Trustee of the \_\_\_\_\_ [Trust Name] (the “Trust”), dated \_\_\_\_\_ [Trust Date], and any amendments thereto, executed before this Will, to be added to the property of that trust. My Trustee shall distribute my estate under the terms of the Trust. If my Trust is not in effect at the time of my death, or if for any other reason the pour over fails, I hereby incorporate all the terms of the Trust into this Will.

## EXECUTOR:

I hereby nominate and appoint:

- **Successor Trustee.** I direct the Successor Trustee mentioned in my Living Trust to act as the Executor under this Will (the “Executor”).

- **Executor.** I direct and appoint the following individual to act as my Executor under this Will:

Executor: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

I hereby grant the following powers and duties to my Executor with respect to my estate:

- To pay all debts and taxes in connection with my estate;
- To pay for all of the funeral expenses and costs related to the disposition of my remains;
- To pay for all administrative expenses associated with the administration of my estate;
- To pay all costs and expenses associated with any real estate that is a part of my estate;
- To take any and all legal actions to ensure the probate of this Will will be completed as quickly as possible, free from any court supervision;
- To sell and/or distribute any and all tangible personal property that belongs to my estate;
- To invest, lease, manage, exchange, mortgage, or sell any real property owned by my estate;
- To handle all investments and securities, including, purchasing, converting, liquidating, or maintaining any assets owned by my estate;

- To open, close, or maintain bank accounts owned by my estate;
- To wind up, liquidate, or otherwise transfer any business interests owned by my estate;
- To employ any professional fiduciary, including, but not limited to, any lawyer, accountant, or other professional;
- To make payments directly to the beneficiaries named in my estate planning.
- Other \_\_\_\_\_.

**GOVERNING LAW.** This Will shall be governed by and construed in accordance with the laws of the state of \_\_\_\_\_, without regard to its conflict of laws principles. Any action or proceeding arising out of or in connection with this Will shall be filed in the courts located in \_\_\_\_\_ State.

I, the undersigned \_\_\_\_\_, do hereby declare that I sign and execute this instrument as my last Will, that I sign it willingly in the presence of each of the undersigned witnesses, and that I execute it as my free and voluntary act for the purposes herein expressed, on the Effective Date.

**The Testator's Name and Signature**

\_\_\_\_\_

**WITNESS ACKNOWLEDGEMENT** *[In certain States is mandatory requirement]*

**Witnesses:**

Witness 1. \_\_\_\_\_

Witness 1's Signature \_\_\_\_\_

Date: \_\_\_\_\_

Witness 2. \_\_\_\_\_

Witness 1's Signature \_\_\_\_\_

Date: \_\_\_\_\_

**NOTARY ACKNOWLEDGEMENT** *[In certain States is mandatory requirement]*

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