

**ASSET
AND
DISTRIBUTION
SCHEDULES**

Distribution Schedules for
The _____ Trust dated the ____ day of _____, 2023

SCHEDULE "A"
BANK ACCOUNT DISTRIBUTION SCHEDULE

Personal

Name of Bank	Last 5 digits Acct. No.	\$ value

Business

Name of Bank	Last 5 digits Acct. No.	\$ value

Distribution:

The above-listed accounts are to be distributed to:

Name:

Address:

Phone:

Name:

Address:

Name:

Address:

If no longer living, then to his lineal heirs per stirpes.

SCHEDULE "B"
REAL PROPERTY DISTRIBUTION SCHEDULE

Distribution Schedules for
The _____ Trust dated the ____ day of _____, 2023

Property address	Ownership percentage	County	Who will inherit	\$ value

Distribution:

These properties are to be distributed to, Listed beneficiaries in table, If no longer living, then to his lineal heirs per stirpes.

Distribution Schedules for
The _____ Trust dated the ____ day of _____, 2023

SCHEDULE "C"
MISCELLANEOUS ACCOUNT DISTRIBUTION

Autos

Make/model	Who will inherit	Value \$

Personal Property

Description	Who will inherit	Value \$

Business Interests

Name of Business	State of Registration	Who will inherit and percentage	What is your ownership (%) ?

Insurance

Name of insurer & acct #	Who will inherit and percentage	Value \$

Investment Accounts

Name & acct #	Who will inherit	Value \$

Distribution:

With regard to all other property listed in this, Schedule "C," the remainder, all business interests owned by Trustor, and non-allocated items shall be distributed to:

Name:
 Address:
 Phone:

Name:
 Address:

Name:
 Address:

Distribution Schedules for
The _____ Trust dated the _____ day of _____, 2023

If no longer living, then to his lineal heirs per stirpes.

Distribution Schedules for
The _____ Trust dated the ____ day of _____, 2023

SCHEDULE "D"
BENEFICIARIES

Beneficiary Schedule

Primary Beneficiary:

Name:

Address:

Phone:

Name:

Address:

Name:

Address:

Res remainders: (in the event a gift lapses Florida Anti-lapse statute captures the bequest and shall distribute the specific bequest to the listed beneficiaries and their lineal heirs per stirpes)

Primary Beneficiary:

Name:

Address:

Phone:

Name:

Address:

Name:

Address:

SCHEDULE "D"
SPECIFIC DISTRIBUTION SCHEDULE

The following distribution schedule is made with the intent to preserve and protect the listed beneficiaries' interest in the Trust to make sure they are ready and at the proper stage in life for each distributions.

Primary Beneficiaries

The trustee retains the authority to make reasonable decision in their fiduciary capacity for the care and maintenance of the listed beneficiaries.

at the age of

18 ... have a valid license, take driver defense course, have a vehicle or \$1500 if vehicle already owned.

21... graduate with college degree or have taken a financial responsibility course, met with a financial planner and have an active bank account, distribute \$3000.00 for start of business or investment into investment portfolio (stock exchange, gold, bonds etc)

25 or 30 days after marriage still is separate property and inheritance for my child, distribute \$10,000 if already have a financial planner and show balance of \$10,000.00 in an investment account.

30... at this age they can become a co-trustee if have completed graduate school, started profession, or running a profitable business.

35... the beneficiary shall have the right to request full distribution of their interest, in accordance with the Trust Agreement, Article II, section 2.K.