

CARLOS BLANCO SANCHEZ

Last Wishes & Trust Architecture — Comprehensive Guide

March 2026

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This document summarizes the estate planning structure, decision-making hierarchy, and explicit wishes of Carlos Blanco Sanchez as expressed in executed trust documents and the notarized Letter of Wishes dated December 30, 2026.

For reference only. Consult original legal documents for binding terms.

Contents

Part I: Letter of Wishes — Core Directives

The Letter of Wishes is a notarized document (Miami-Dade County, December 30, 2026) that expresses Carlos’s most urgent and non-negotiable wishes regarding his minor children.

Children

Child	Date of Birth
Carlos Blanco Álvarez	February 6, 2019
Sebastian Blanco Álvarez	August 30, 2022

Plus any other children who are minors at time of death.

Directive 1: Absolute Prohibition on Relocation to Mexico

Under NO circumstances are the children to be taken to Mexico — neither temporarily nor permanently.

- If Carlos dies before his former wife, she is explicitly directed NOT to remove the children from the United States
- Any court with jurisdiction is requested to give the **strongest possible weight** to this restriction
- This applies to guardianship AND custody determinations

Directive 2: Guardianship

Role	Person	Address
Primary Guardian	Ana Blanco Sanchez (sister)	1020 Mariner Drive, Key Biscayne, FL 33149
Successor Guardian	TBD (to be designated)	

Directive 3: Permanent U.S. Residence & Education

Upon Carlos’s death, the children are to be:

1. **Immediately relocated to the United States** (if not already there)
2. **Enrolled in a reputable U.S. boarding school or day school**
3. **Remain in the U.S.** until they reach age of majority or complete higher education
4. Living arrangements must be appropriate and supervised

Directive 4: Financial Support from the Children’s Trust

All costs are to be paid **exclusively from the Children’s Trust**:

- Day-to-day living expenses
- Tuition and boarding fees
- Medical insurance
- Extracurricular activities
- All other costs of raising them in the United States

Directive 5: Protected Real Estate

Two properties are **NOT to be sold** unless the Investment Committee unanimously agrees:

Property	Address	Purpose
Grand Bay Condo	445 Grand Bay Drive, Apt 308	Rent out → service mortgage
Mariner Drive Home	1020 Mariner Drive, Key Biscayne	Rent out → service mortgage

- Both must be rented at fair market value
- Rental income services existing mortgages first
- Once mortgage-free, surplus goes to the Children’s Trust
- Sale requires **unanimous** Investment Committee approval

Investment Committee

Member	Role
David Cuetos	Chair, primary decision-maker
Rakesh Rajwani	Co-member
Additional members	As appointed by Cuetos and Rajwani

The Investment Committee determines all investment policy and strategy for the Trust, following professional guidance on income-generating and growth-oriented strategies.

Witnesses & Notarization

Role	Name
Witness	Manuel Das Carrancas Brida
Notary	Kaylee Leon (FL Commission HH 291156)
Notary Expiration	July 14, 2026

⚠ **Note:** The notary commission expires July 14, 2026. Consider re-notarizing before that date if any updates are needed.

Part II: Trust Architecture Overview

Carlos’s estate plan consists of **three trusts**, two **administrative LLCs**, and a **revocable trust** that serves as the master vehicle during his lifetime.



Figure 1: Estate Plan Overview — Current Assets and Administration

The Three Trusts

1. CBS Revocable Trust (Taxable Estate)

Feature	Detail
Type	Revocable (can be amended/revoked by Carlos)
Created	January 26, 2021 (amended Dec 2022, Mar 2024, restated)
Settlor	Carlos Blanco Sanchez
Current Trustee	Carlos Blanco Sanchez
Successor Trustee	David Cuetos (backup: Rakesh Rajwani)
Governing Law	Florida Trust Code, F.S. 736
Tax Status	In Carlos’s taxable estate during his lifetime

During Carlos’s lifetime: Carlos has full control — can amend, revoke, direct investments, make distributions, make gifts to descendants.

Upon Carlos’s death: Trustee becomes David Cuetos. The trust estate is distributed as follows:

Carlos Blanco Sanchez - Summary of Current Assets & Administration

Irrevocable Trusts

CBS 2021 Security Trust
 Assets: _____ (approx. \$ _____ MM)
 Trustee: Bridgeford
 Beneficiaries: Carlos’ descendants
 (see Slide 4)

CBS Legacy Trust
 Assets: _____ (approx. \$ _____ MM)
 Trustee: Bridgeford
 Beneficiaries: Carlos and Carlos’ descendants
 (see Slide 5)

Individually Owned & Revocable Trust

Carlos/CBS Revocable Trust
 (still in taxable estate)
 Assets: _____ (approx. \$ _____ MM)
 Trustee: Carlos
 (see Slide 3)

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Figure 2: CBS Revocable Trust — Succession Plan

Distribution Upon Death (in order):

1. **Last expenses, income taxes, estate administration**
2. **Specific Bequests:**
 - \$1,000,000 to sister Ana Blanco Sanchez (if she survives Carlos)
 - \$1,000,000 to Regina Alvarez Bringas (only if divorced; reduced by any divorce settlement amounts)
 - Tangible personal property by memorandum, otherwise to children
3. **Legacy Trust II:** The lesser of \$5,000,000 or Remaining GST Tax Exemption → CBS Legacy Trust II
4. **Security Trust II:** Any additional Remaining GST Tax Exemption → CBS Security Trust II
5. **Children’s Trust:** Remaining balance → Trust for Children (Article 8)
6. **Trust for Regina** (only if still married at death):
 - Trustee: David Cuetos
 - Income to Regina; Principal for HEMS (health, education, maintenance, support)
 - Terminates on Regina’s death → assets to Carlos Jr. and Sebastian equally

2. CBS 2021 Security Trust (Irrevocable)

Feature	Detail
Type	Irrevocable
Trustee	Bridgford Trust Company LLC (South Dakota)
Grantor	Carlos Blanco Sanchez
Beneficiaries	Carlos’s descendants only (NOT Carlos)
Trust Protector	Blanco TP LLC
Investment Advisor	Blanco TA LLC
Distribution Advisor	Blanco TA LLC
Assets	CBS LLC (Life Insurance \$62.7M face + other investments)

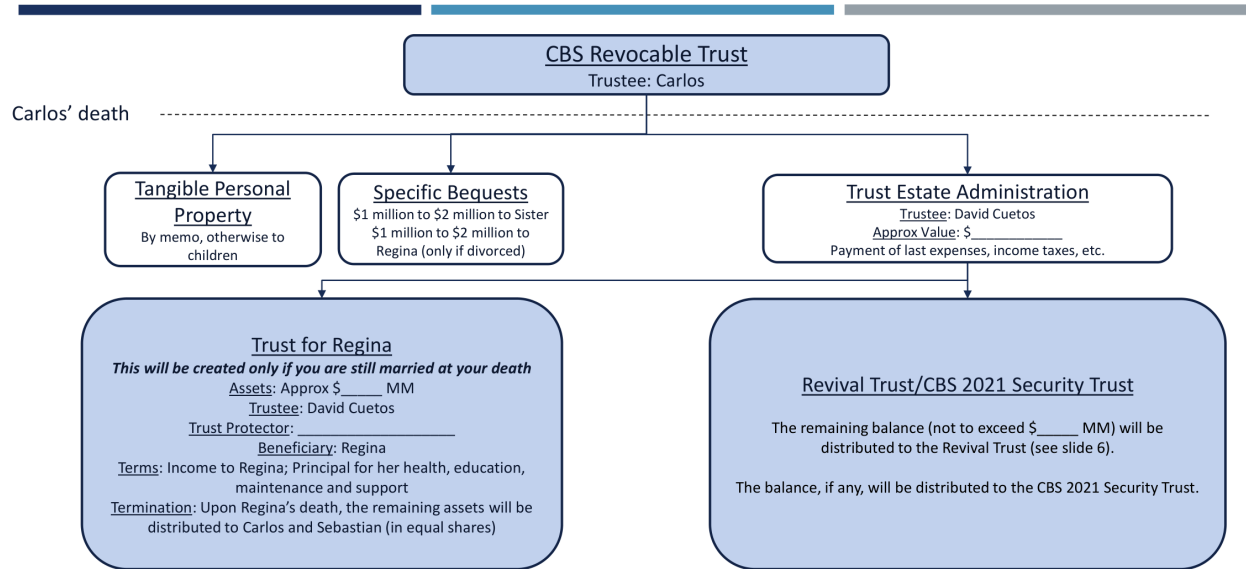
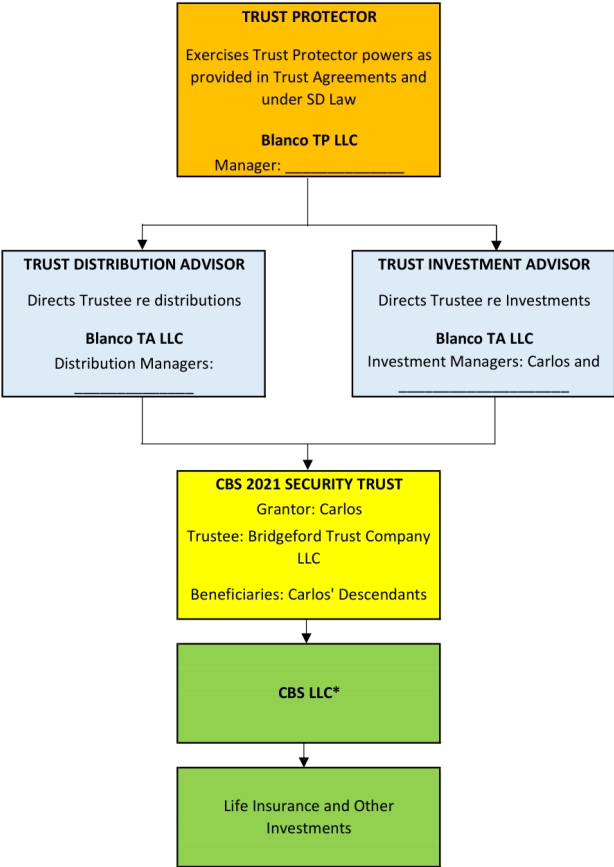


Figure 3: CBS 2021 Security Trust — Structure and Terms

CBS 2021 SECURITY TRUST STRUCTURE



* Assets per Organizational Chart. Chart also states that the LLC contains LWC - pending.

Figure 4: CBS 2021 Security Trust — Organizational Chart

Key Terms:

- **HEMS Standard:** Income and/or principal for health, education, maintenance and support
- **Additional:** Principal for any purpose (at Independent Trustee’s discretion)
- **At age 30:** 3-5% unitrust distributions to oldest generation beneficiaries then living
- **Rights of withdrawal** for additional contributions

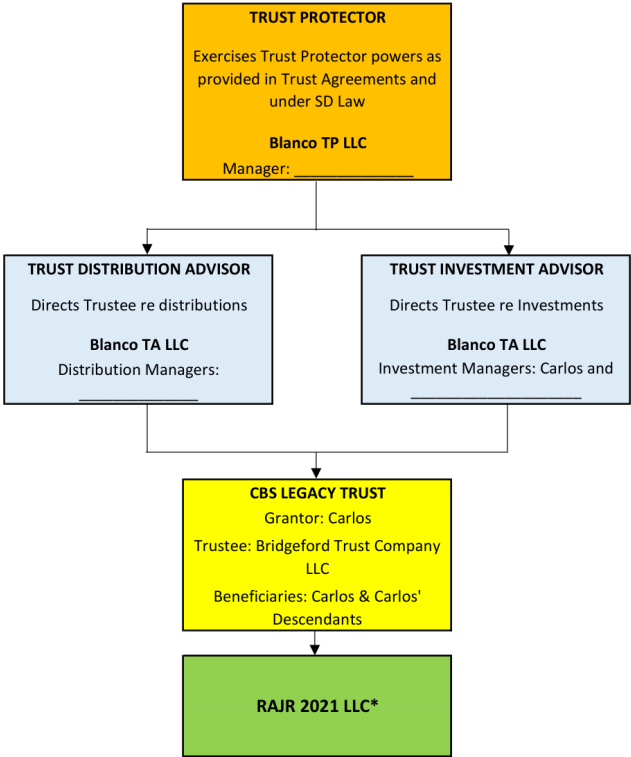
After Carlos’s Death → Single Trust for Children and Descendants:

- Same trustee (Bridgeford), protector, and advisors
- Same HEMS standard + additional for any purpose
- 3-5% unitrust at age 30

3. CBS Legacy Trust (Irrevocable)

Feature	Detail
Type	Irrevocable
Trustee	Bridgeford Trust Company LLC (South Dakota)
Grantor	Carlos Blanco Sanchez
Beneficiaries	Carlos AND Carlos’s descendants
Trust Protector	Blanco TP LLC
Investment Advisor	Blanco TA LLC
Distribution Advisor	Blanco TA LLC
Assets	RAJR 2021 LLC (100%), \$1M gift tax entity, holds 20% of operating companies

CBS LEGACY TRUST STRUCTURE



* Assets per Organizational Chart.

Figure 5: CBS Legacy Trust — Organizational Chart

Key Terms:

- Same HEMS standard + additional for any purpose
- Carlos IS a beneficiary (unlike the Security Trust)
- After Carlos’s death → Single Trust for Children and Descendants (same terms as Security Trust)

4. Revival Trust (Cryonics)

Feature	Detail
Type	Created from Revocable Trust upon death
Trustee	Bridgeford Trust Company LLC (South Dakota)
Trust Protector	Blanco TP LLC
Investment Advisor	Blanco TA LLC
Beneficiaries	Carlos and Carlos’s descendants
Primary Purpose	Fund Carlos’s cryogenics and preserve assets for his revival

Key Terms:

- Primary: Provide funds for cryogenics following death and **preserve assets for Carlos upon revival**
- Secondary: If those purposes are fulfilled, income/principal may go to descendants for HEMS
- **Upon Carlos’s revival:** He becomes a beneficiary, and the trust may terminate and distribute to him outright
- Amount: Not to exceed \$_____ MM (to be specified)

Note: Carlos has an active Alcor membership (cryonics provider).

Part III: Decision-Making Hierarchy

During Carlos’s Lifetime

Carlos has **full control** over all entities:

Decision	Who Decides
Revocable Trust amendments	Carlos (sole)
Investment direction	Carlos (sole)
Trust distributions	Carlos (sole as trustee)
Addition/removal of trustees	Carlos (sole)
Gifts from trust	Carlos (subject to HEMS standard for others)
Business operations	Carlos (through operating LLCs)

Upon Carlos’s Incapacity

Role	Person	Power
Trust Protector	David Cuetos	Oversight, removal/appointment of trustees
Successor Trustee (Revocable)	David Cuetos	Manages revocable trust estate
Trustee (Irrevocable)	Bridgeford Trust Co.	Manages Security & Legacy Trusts
Investment Advisor	Blanco TA LLC	Directs Bridgeford on investments
Distribution Advisor	Blanco TA LLC	Directs Bridgeford on distributions

Upon Carlos’s Death

Immediate Actions:

1. David Cuetos becomes Trustee of CBS Revocable Trust
2. Pay last expenses, taxes, administration
3. Make specific bequests (\$1M sister, \$1M Regina if divorced)
4. Create Trust for Regina (if still married)
5. Distribute to Legacy Trust II and Security Trust II (GST exemption)
6. Remainder → Children’s Trust
7. Revival Trust funded for cryonics
8. Children relocated to U.S., enrolled in school (Letter of Wishes)
9. Grand Bay and Mariner Drive rented, NOT sold

Ongoing Governance After Death:

Entity	Controller	Duties
All trusts	Bridgeford Trust Co. (institutional)	Administration, custody, compliance
Trust Protector	David Cuetos → successor	Oversight, can modify/remove trustees
Investment decisions	Blanco TA LLC (David Cuetos & Rakesh Rajwani)	Direct Bridgeford on investments

Entity	Controller	Duties
Distribution decisions	Blanco TA LLC	Direct Bridgeford on distributions
Children’s Trust	David Cuetos as Trustee (backup: Rakesh Rajwani)	HEMS distributions for children
Real estate	Investment Committee (Cuetos + Rajwani)	Cannot sell Grand Bay or Mariner without unanimous consent

Part IV: How the Children Access Money

Before Age 21 (Children’s Trust — Article 8)

- **Standard:** HEMS (Health, Education, Maintenance, Support) in accustomed manner of living
- **Who decides:** Trustee (David Cuetos) with discretion
- **Unequal distributions:** Trustee can give more to one child based on needs, age, health, education, aptitude
- **No court reporting:** Only Trust Protector receives accountings (not the children or anyone else)

Age 21: Trust Division

When the **youngest living child** turns 21, the Children’s Trust divides into **Separate Trusts** for each descendant (Article 9).

Age 21-29 (Separate Trust)

- **Standard:** HEMS + additional for any purpose (via Independent Trustee)
- **Who decides:** David Cuetos as Trustee (backup: Rakesh Rajwani)
- **Income accumulates** if not distributed (added to principal annually)

Age 25: Co-Trustee Eligibility

A descendant can become **co-Trustee** of their own Separate Trust at age 25 **IF AND ONLY IF:**

The descendant is currently earning income (excluding trust distributions) that is **above the U.S. national average** for their age, based on their profession, as established by **three (3) accredited salary benchmarking institutions** selected by the Trust Protector.

This is a critical condition — it incentivizes the children to be financially self-sufficient before gaining any control over their trust.

Age 30: Unitrust Distributions Begin

Starting at age 30, each child receives **mandatory annual distributions:**

Period	Distribution Rate
Years 1-3 (age 30-32)	4% of trust net asset value (beginning of year)
Year 4+ (age 33+)	4% of 3-year rolling average net asset value

Example: If a Separate Trust holds \$20M at age 30: - Year 1: \$800,000 (4% × \$20M), paid quarterly (\$200K/quarter) - Year 4+: 4% of average of prior 3 years’ NAV

Additional distributions above the 4% unitrust remain at the Independent Trustee’s discretion for any purpose.

Death of a Beneficiary

If a child dies before their Separate Trust is fully distributed:

1. **General Power of Appointment:** The deceased child can direct (by will) where assets go — but only to Carlos’s descendants
2. **Default:** If no appointment, assets pass to the deceased child’s own descendants (per stirpes)

3. **If no descendants:** To nearest Carlos descendant line, per stirpes
4. **If NO descendants of Carlos survive:** To heirs-at-law under Florida intestacy

Part V: Trust Protector Powers (Article 13)

The Trust Protector is a powerful supervisory role — currently **David Cuetos**.

Powers of the Trust Protector:

1. **Modify trust terms** to respond to changes in tax law
2. **Remove and appoint trustees** (including corporate trustees)
3. **Change trust situs** (move to another state/jurisdiction)
4. **Convert to total return trust** (unitrust conversion)
5. **Veto distributions** that the Trust Protector believes are inappropriate
6. **Approve accountings** on behalf of minor beneficiaries
7. **Receive all trust information** (sole recipient of accountings — not the children)
8. **Add or remove investment advisors**
9. **Merge trusts** with substantially similar terms
10. **Terminate small trusts** if uneconomical to administer
11. **Grant or limit powers of appointment**

Succession of Trust Protector:

Order	Person
1st	David Cuetos
2nd	Appointed by David Cuetos (written instrument)
3rd	If vacancy, appointed by majority of qualified beneficiaries over 25

Limitations:

- Trust Protector acts in **non-fiduciary capacity**
- No duty to monitor — discretionary
- Liable only for **gross negligence, fraud, or willful misconduct**
- Cannot exercise powers in a way that would benefit themselves
- Entitled to reasonable compensation

Part VI: Administrative Entities

Blanco TP LLC — Trust Protector Entity

Detail	
Organized	South Dakota (Articles filed Dec 26, 2024)
Purpose	Serve as Trust Protector for CBS irrevocable trusts
Manager	TBD (to be designated)
SPE Status	Special Purpose Entity notice filed with Bridgeford

Blanco TA LLC — Trust Advisor Entity

Detail	
Purpose	Investment Advisor + Distribution Advisor for all trusts
Investment Managers	Carlos (during lifetime) + TBD
Distribution Managers	TBD (to be designated)

CBS LLC — Insurance Holding

Detail	
Held in	CBS 2021 Security Trust
Assets	Life Insurance (\$62,732,723 face value) + other investments
Notes	LWC pending

RAJR 2021 LLC — Gift Entity

Detail	
Held in	CBS Legacy Trust
Purpose	\$1M gift tax entity
Holds	20% of certain operating companies

Part VII: Key Contacts & Service Providers

Role	Person/Entity	Notes
Settlor/Grantor	Carlos Blanco Sanchez	
Successor Trustee (Revocable)	David Cuetos	1st successor
Backup Successor Trustee	Rakesh Rajwani	2nd successor
Institutional Trustee (Irrevocable)	Bridgeford Trust Company LLC	South Dakota
Trust Protector	David Cuetos (via Blanco TP LLC)	
Investment Advisor	Blanco TA LLC (Cuetos + Rajwani)	
Guardian (Children)	Ana Blanco Sanchez	Carlos's sister
Former Wife	Regina Alvarez Bringas	Divorce pending/filed
Children	Carlos Blanco Álvarez (2019), Sebastian Blanco Álvarez (2022)	
Cryonics Provider	Alcor Life Extension Foundation	Active membership

CONFIDENTIAL — Prepared by OpenClaw, March 2026

This document is a summary for reference purposes only. The binding legal terms are contained in the original executed trust instruments.

Documents on file: CBS Revocable Trust Restatement (46 pages), CBS 2021 Security Trust, CBS Legacy Trust, Letter of Wishes, CBS TP LLC Operating Agreement, CBS TA LLC Operating Agreement, Articles of Organization, and related documents.