



WEALTH TRANSFER PLANNING
TRUSTS AND ESTATES

CARLOS BLANCO SANCHEZ

FLOWCHART DIAGRAM OF PROPOSED PLANNING DOCUMENTS

JULY 2024



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)

Carlos' death

CBS Revocable Trust
Trustee: Carlos

Tangible Personal Property
By memo, otherwise to children

Specific Bequests
\$1 million to \$2 million to Sister
\$1 million to \$2 million to Regina (only if divorced)

Trust Estate Administration
Trustee: David Cuetos
Approx Value: \$ _____
Payment of last expenses, income taxes, etc.

Trust for Regina
This will be created only if you are still married at your death
Assets: Approx \$ _____ MM
Trustee: David Cuetos
Trust Protector: _____
Beneficiary: Regina
Terms: Income to Regina; Principal for her health, education, maintenance and support
Termination: Upon Regina's death, the remaining assets will be distributed to Carlos and Sebastian (in equal shares)

Revival Trust/CBS 2021 Security Trust
The remaining balance (not to exceed \$ _____ MM) will be distributed to the Revival Trust (see slide 6).
The balance, if any, will be distributed to the CBS 2021 Security Trust.

CBS 2021 Security Trust

Assets: Approx \$ ____ MM

Trustee: Bridgeford

Trust Protector: Blanco TP LLC

Trust Investment Advisor: Blanco TA LLC

Trust Distribution Advisor: Blanco TA LLC

Beneficiaries: Carlos' descendants

Terms: Rights of withdrawal for additional contributions; Income and/or Principal for health, education, maintenance and support; Additional principal for any purpose

Carlos' death*

Single Trust for Children and Descendants

Assets: Balance of Trust

Trustee: Bridgeford

Trust Protector: Blanco TP LLC

Trust Investment Advisor: Blanco TA LLC

Trust Distribution Advisor: Blanco TA LLC

Beneficiaries: Carlos' descendants

Terms: Income and/or Principal for health, education, maintenance and support; Additional principal for any purpose; 3-5% unitrust distributions at age 30 to the beneficiaries of the oldest generation then living (relative to Carlos)



CBS Legacy Trust

Assets: Approx \$ ____ MM

Trustee: Bridgeford

Trust Protector: Blanco TP LLC

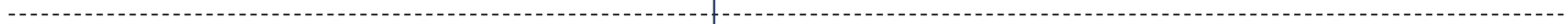
Trust Investment Advisor: Blanco TA LLC

Trust Distribution Advisor: Blanco TA LLC

Beneficiaries: Carlos and Carlos' descendants

Terms: Income and/or Principal for health, education, maintenance and support;
Additional principal for any purpose

Carlos' death



Single Trust for Children and Descendants

Assets: Balance of Trust

Trustee: Bridgeford

Trust Protector: Blanco TP LLC

Trust Investment Advisor: Blanco TA LLC

Trust Distribution Advisor: Blanco TA LLC

Beneficiaries: Carlos' descendants

Terms: Income and/or Principal for health, education, maintenance and support;
Additional principal for any purpose; 3-5% unitrust distributions at age 30 to the
beneficiaries of the oldest generation then living (relative to Carlos)

Revival Trust

Assets: Approx \$_____ MM

Trustee: Bridgeford

Trust Protector: Blanco TP LLC

Trust Investment Advisor: Blanco TA LLC

Trust Distribution Advisor: Blanco TA LLC

Beneficiaries: Carlos and Carlos' descendants

Terms: Primary purpose is to provide funds for Carlos' cryogenics following his death and to preserve assets for Carlos upon his revival.

To the extent that such purposes are fulfilled, Income and/or Principal may be distributed to Carlos' descendants for health, education, maintenance and support. Upon Carlos' revival, he will be included as a beneficiary of the trust and the trust may terminate and distribute to him outright and free of trust.