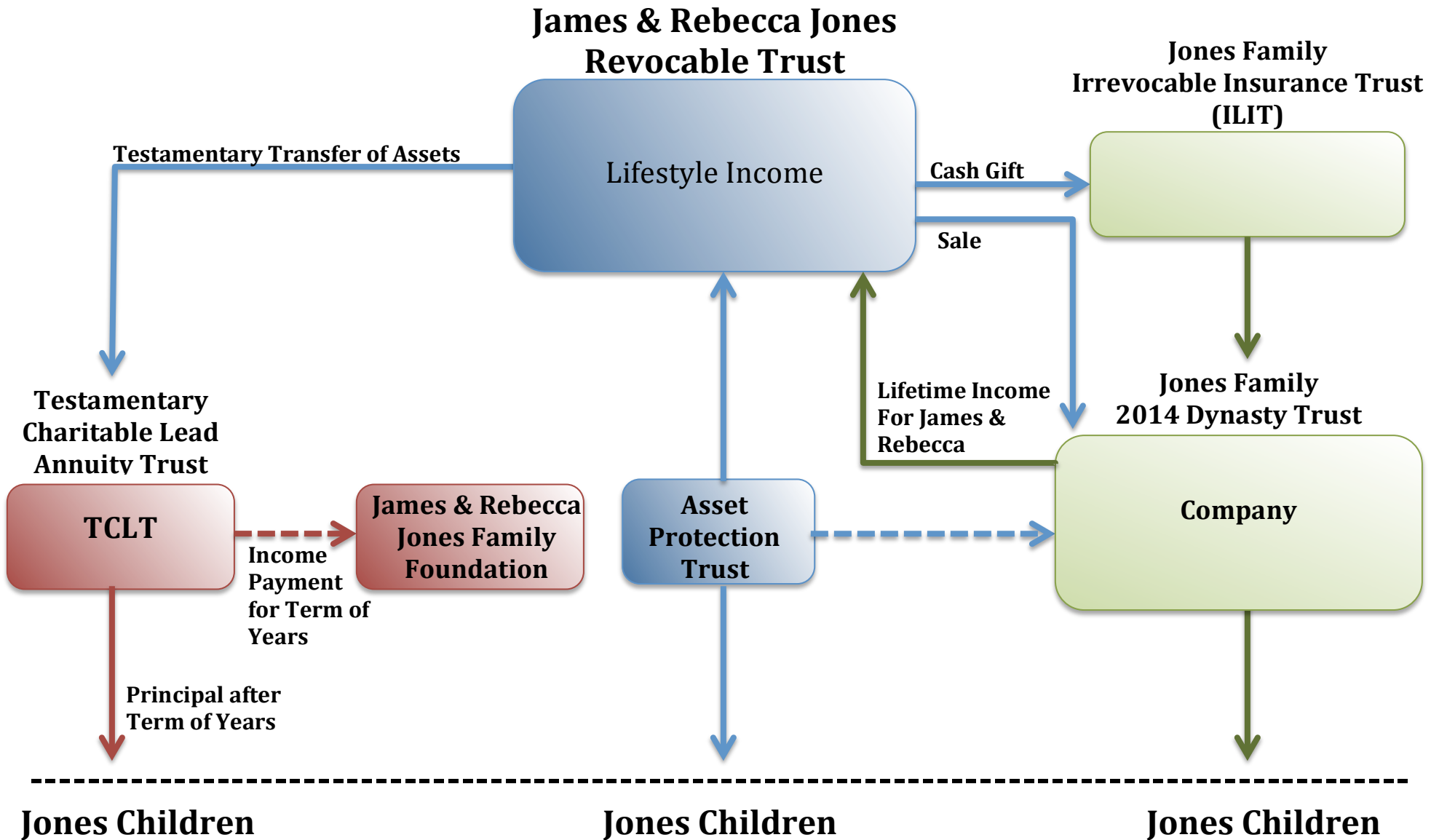


James & Rebecca Jones Estate Plan Overview



James & Rebecca Jones

Estate Plan Overview

Legend:

Red:

Represents assets in trusts that are earmarked for your charities. These benefit others who are not family. These are also “Leave On” assets. They constitute your “Charity Legacy”.

Blue:

Represents assets in trusts that are earmarked for lifestyle income. These are “Live On” assets. They are for your lifetime benefit.

Green:

Represents assets in trusts that are earmarked for the benefit of yourselves and your children, including future generations. These are “Leave On” assets. They constitute your “Family Legacy”.