







# Henry & Mary Price

## Estate Document Summary

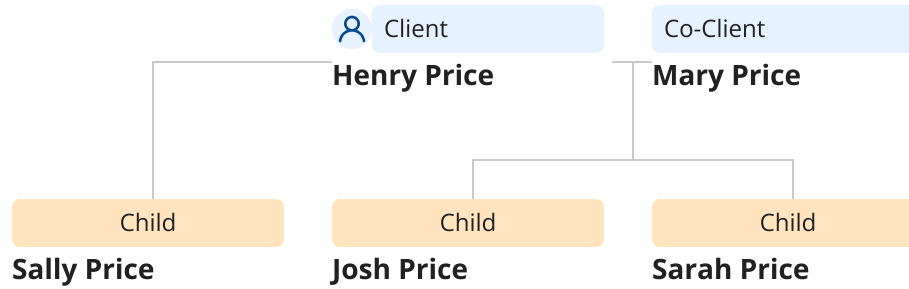
Snapshot generated 3/17/2026

List of Documents Included in Snapshot					Page (1/1)
	Client	Signed	Co-Client	Signed	
<b>Will</b>	 henry-will.pdf	Unknown	 Mary-will.pdf	4/30/19	
<b>POA</b>	 henry poa.pdf	2/2/02	 mary poa.pdf	2/2/02	
<b>Healthcare Docs</b>	 henry hcd.pdf	2/2/02	 mary hcd.pdf	2/2/02	
	<b>Joint</b>			Signed	
<b>Revocable Trust</b>	 price joint trust.pdf			Unknown	

# Henry & Mary Price

Family Tree

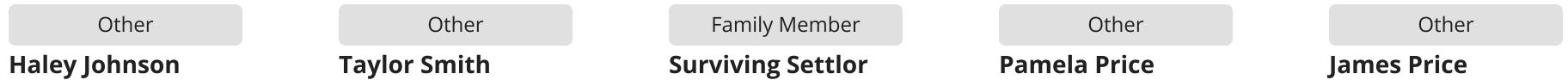
## Family Map



## Grandchildren



## Others



## Fiduciaries - Will & Trust

### Client

#### Henry Price's Will

Executors	<b>Mary Price</b>
Successor Executors	<b>Haley Johnson Taylor Smith</b>
Legal Guardians	<b>Henry Price Mary Price Haley Johnson Taylor Smith</b>

### Co-Client

#### Mary Price's Will

Executors	<b>Henry Price</b>
Successor Executors	<b>Haley Johnson Taylor Smith</b>
Legal Guardians	<b>Henry Price Haley Johnson Taylor Smith</b>

### Joint

#### The Price Family Trust

Co-trustee	<b>Henry Price or Mary Price (Survivor may continue as sole trustee)</b>
Successor Trustee	<b>Haley Johnson Taylor Smith</b>

# Henry & Mary Price

## Fiduciaries - POA and Healthcare Documents

### Client

#### Power of Attorney - Henry Price

Agent's name	<b>Mary Price</b>
Successor agents	<b>Mary Price and then Josh Price</b>

Is it springing?	<b>No</b>
Can the agent make gift and other tax-related decisions?	<b>Yes</b>

Governing Law	<b>Oregon</b> 
---------------	---

#### Healthcare Documents - Henry Price

Health Care POA Agent	<b>Mary Price (Page 2, Designation of Health Care Agent)</b>
Health Care POA Successor Agents	<b>Johnny Do Good (Page 2, Designation of Health Care Agent)</b>

HIPAA Paragraph in Document	<b>Yes (Page 7, Release of Medical Information)</b>
-----------------------------	---

Governing Law	<b>Oregon</b> 
---------------	---

### Material information

The 'Advance Healthcare Directive' and the 'HIPAA Authorization' provided is blank, unsigned and undated.

### Co-Client

#### Power of Attorney - Mary Price

Agent's name	<b>Henry Price</b>
Successor agents	<b>Henry Price and then Josh Price</b>

Is it springing?	<b>No</b>
Can the agent make gift and other tax-related decisions?	<b>Yes</b>

Governing Law	<b>Oregon</b> 
---------------	---

#### Healthcare Documents - Mary Price

Health Care POA Agent	<b>Henry Price (Page 2, Designation of Health Care Agent)</b>
Health Care POA Successor Agents	<b>Johnny Do Good (Page 2, Designation of Health Care Agent)</b>

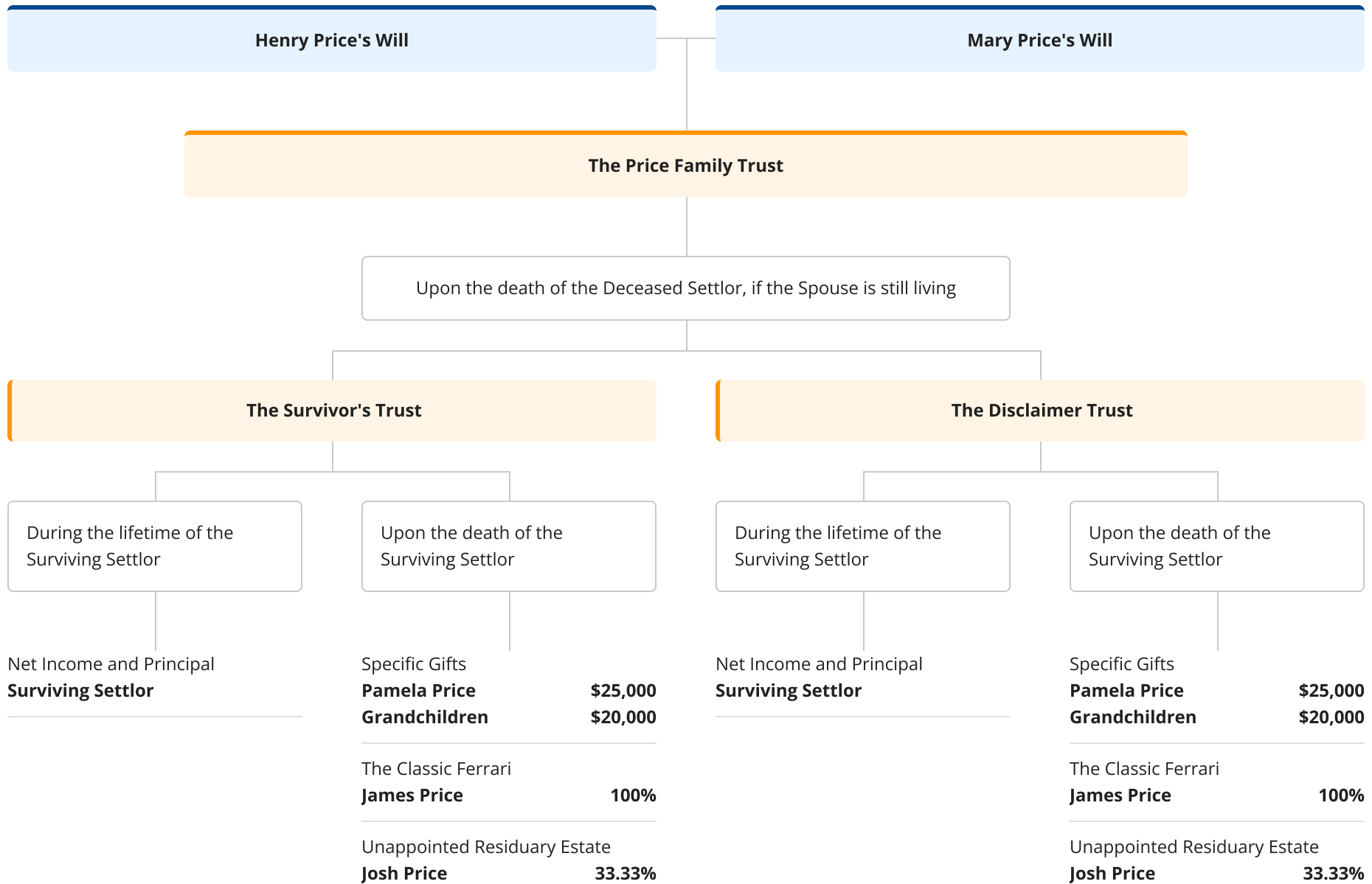
HIPAA Paragraph in Document	<b>Yes (Page 7, Release of Medical Information)</b>
-----------------------------	---

Governing Law	<b>Oregon</b> 
---------------	---

### Material information

The 'Advance Healthcare Directive' and the 'HIPAA Authorization' provided is blank, unsigned and undated.

## Overview (1/2)



## The Survivor's Trust

Upon the death of the  
Surviving Settlor

<b>Sarah Price</b>	<b>33.33%</b>
<b>Sally Price</b>	<b>33.33%</b>

---

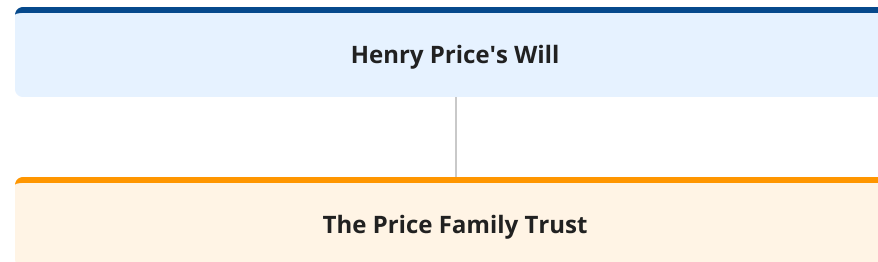
## The Disclaimer Trust

Upon the death of the  
Surviving Settlor

<b>Sarah Price</b>	<b>33.33%</b>
<b>Sally Price</b>	<b>33.33%</b>

---

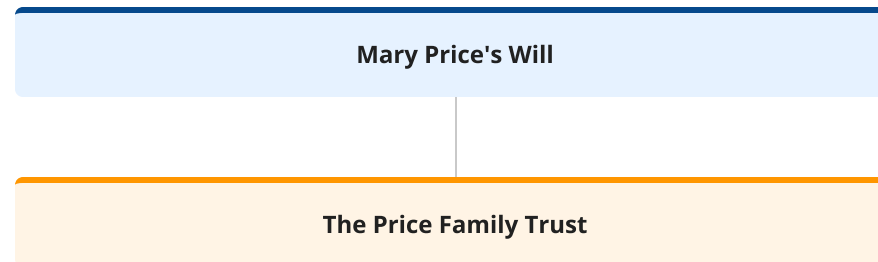
## Material Information - Will (1/2)



### Material information

1. The Last Will and Testament of Henry Price is unsigned and undated. Henry nominates Mary to act as the Executor and Personal Representative. If Mary fails or ceases to act as such, then she nominates Haley Johnson and then Taylor Swift. They shall also act as the Digital Executors of his Will. Henry has nominated Mary as the Guardian of each of her children, and then Haley Johnson as Backup Guardian 1 and then Taylor Swift as Backup Guardian 2. Henry has also nominated Pet Caregivers for her pets. She nominates Mary as the Primary Caregiver and then Haley Johnson and then Taylor Swift as Backup Caregiver 1 and Backup Caregiver 2 respectively. (Pages 2, 3, 4 and 5, Guardianship, Pet Caregiver, Executor of Estate, and Digital Executor)
2. Henry leaves her residuary estate to the then-serving Trustee of the Trust to be added to the principal of the Trust and to be held, administered, and distributed subject to the terms of the Trust. If her spouse has predeceased her, any property so added to the Trust, be added to the principal of the Survivor's Trust created under the Trust. (Page 3, Distribution of Estate)
3. Henry intentionally and with full knowledge of the consequences omits and does not provide in this Will for any persons, descendants, or heirs that are not named or described in this Will. A beneficiary must survive Henry for at least 120 hours to receive property under this Will. (Pages 3 and 4, Disinheritance and Survivorship)
4. If, at any time, there is no person or entity qualified to receive final distribution of Henry's estate, or any part of it, then the portion of her estate, with respect to which the failure of qualified recipients has occurred shall be distributed one-half to those persons who would inherit it had Henry then died intestate owning the property, and one-half to those persons who would inherit it had her spouse then died intestate owning such property, all as determined and in the proportions provided by the laws then in effect. (Page 4, Remote Contingent Distribution)
5. The Will also contains provisions for the following - 'Taxes, Claims, Debts and Expenses' on Page 6; and 'Final Arrangements' on Page 8.

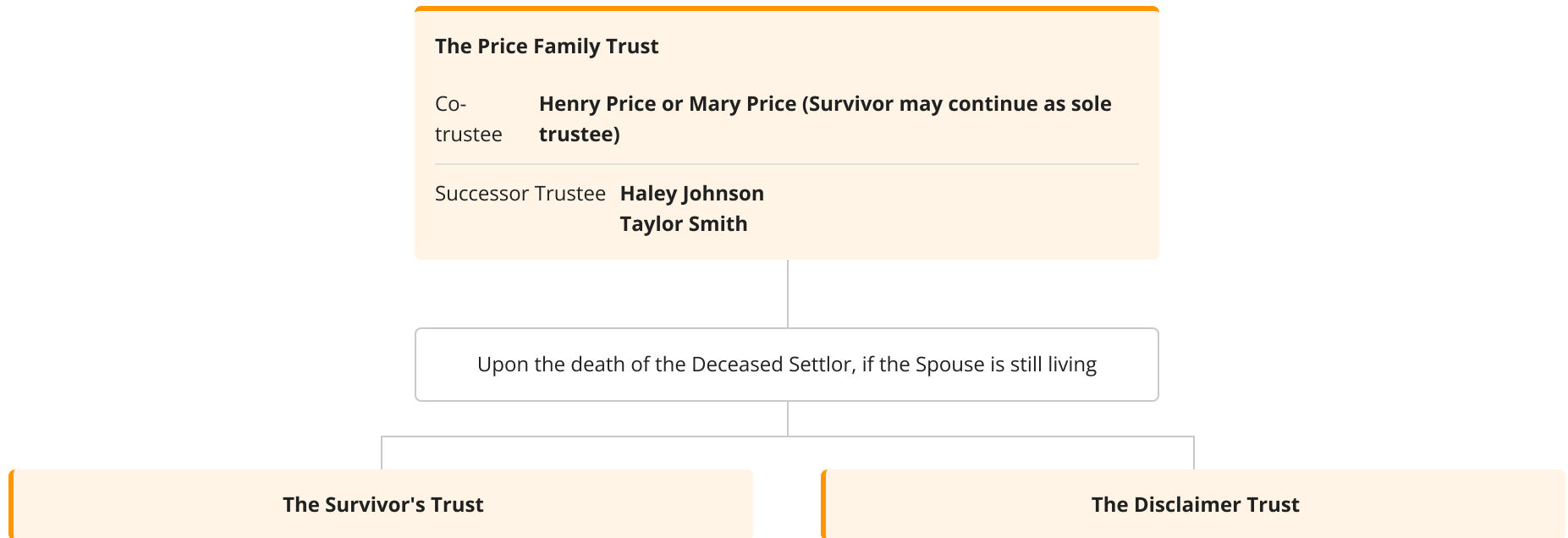
## Material Information - Will (2/2)



### Material information

1. The Last Will and Testament of Mary Price is unsigned and undated. Mary nominates Henry to act as the Executor and Personal Representative. If she fails or ceases to act as such, then he nominates Haley Johnson and then Taylor Smith. They shall also act as the Digital Executors of her Will. Mary has nominated Henry as the Guardian of each of his children, and then Haley Johnson as Backup Guardian 1 and then Taylor Smith as Backup Guardian 2. Mary has also nominated Pet Caregivers for his pets. He nominates Henry as the Primary Caregiver and then Haley Johnson and then Taylor Smith as Backup Caregiver 1 and Backup Caregiver 2 respectively. (Pages 2, 3, 4 and 5, Guardianship, Pet Caregiver, Executor of Estate, and Digital Executor)
2. Mary leaves his residuary estate to the then-serving Trustee of the Trust to be added to the principal of the Trust and to be held, administered, and distributed subject to the terms of the Trust. If his spouse has predeceased him, any property so added to the Trust, be added to the principal of the Survivor's Trust created under the Trust. (Page 3, Distribution of Estate)
3. Mary intentionally and with full knowledge of the consequences omits and does not provide in this Will for any persons, descendants, or heirs that are not named or described in this Will. A beneficiary must survive Mary for at least 120 hours to receive property under this Will. (Pages 3 and 4, Disinheritance and Survivorship)
4. If, at any time, there is no person or entity qualified to receive final distribution of Mary's estate, or any part of it, then the portion of his estate, with respect to which the failure of qualified recipients has occurred shall be distributed one-half to those persons who would inherit it had Mary then died intestate owning the property, and one-half to those persons who would inherit it had his spouse then died intestate owning such property, all as determined and in the proportions provided by the laws then in effect. (Page 4, Remote Contingent Distribution)
5. The Will also contains provisions for the following - 'Taxes, Claims, Debts and Expenses' on Page 6; and 'Final Arrangements' on Page 8.

## Material Information - Trust (1/7)



### Material information

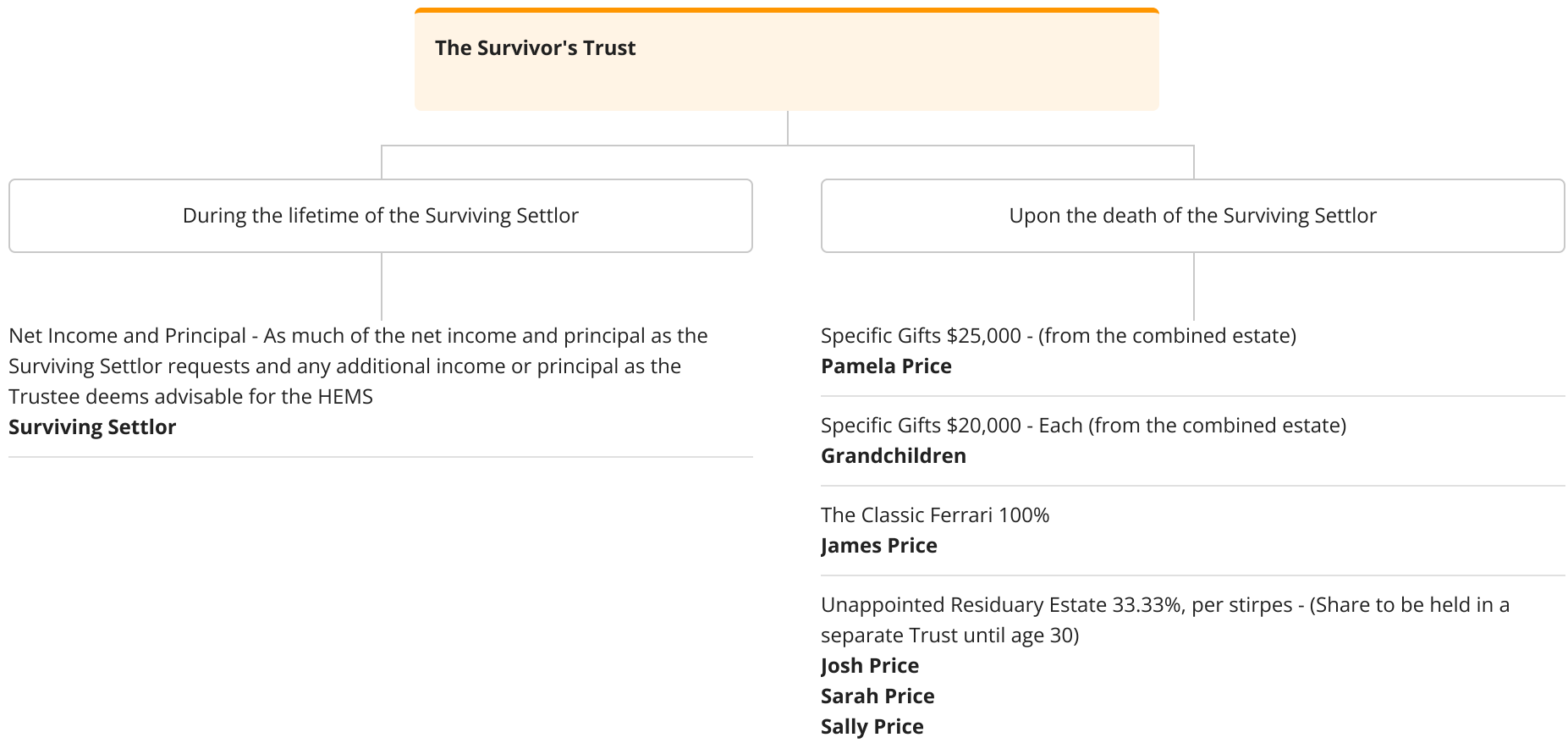
1. The Price Family Trust is unsigned and undated. Henry and Mary are the initial Co-Trustees. If either Settlor ceases to serve as Trustee due to death, resignation, incapacity, or any other reason, then the other Settlor shall become the sole Trustee. If both Settlers cease to serve as Trustee due to death, resignation, incapacity, or any other reason, then Haley Johnson shall become successor Trustee. Upon the death of the Deceased Settlor, the trust will become irrevocable. (Pages 3 and 6, Articles 1 - E and Article 3 - A)
2. While both Settlers are living, the Trustee shall pay to, or for the benefit of, the Settlers all of the community property and from each Settlor's separate property, net income, in equal shares and at least quarterly and principal as the Settlers request and any additional principal as the Trustee deems advisable. If one Settlor lacks the capacity to make requests for distributions of separate property principal, the other Settlor If both Settlers lack the capacity to make requests for distributions of separate property principal, the Trustee may make distributions may make a request on behalf of the incapacitated Settlor. If both Settlers lack the capacity to make requests for distributions of separate property principal, the Trustee may make distributions as the Trustee determines to be appropriate for the HEMS of the Settlers. (Page 5, Article 2 - E)

## Material Information - Trust (2/7)

### Material information

3. Each Settlor has a general power of appointment over any or all of the principal and undistributed income of that Settlor's separate property, one-half of the community property, and one-half of quasi-community property. This is a general power of appointment that may be exercised in favor of any appointee, including the appointing Settlor or the estate of the appointing Settlor. (Page 6, Article 2 - G)
4. After the death of the Deceased Settlor, the Trustee may continue to hold and administer the Deceased Settlor's Property and the Surviving Settlor's Property together in a single administrative trust for as long as the Trustee deems reasonably necessary. During the term of the Administrative Trust, the Trustee shall pay the entire net income of the Administrative Trust to the Surviving Settlor (Page 7, Article 3 - A)
5. The Trustee shall distribute the Surviving Settlor's Property to the Trustee of the Survivor's Trust. If the Survivor's Trust is the only trust created as a result of the death of the Deceased Settlor, any transfers to the Survivor's Trust may be made without any change of title. If the Deceased Settlor has exercised a power of appointment over any portion of the Deceased Settlor's Property, then the Trustee shall distribute that appointed portion of the Deceased Settlor's Property in accordance with the power of appointment, and any property not so appointed, shall be distributed to the Trustee of the Survivor's Trust. (Pages 6 and 7, Article 3 - B and C)
6. The Trust document also contains provisions for the following : 'Distributions to Protected Beneficiaries' in Article 8; 'Spendthrift Trust' in Article 11-D; 'Maximum Term for Trusts' in Article 11-E; 'Disinheritance' in Article 11-G; 'Remote Contingent Distribution' in Article 11-I; 'Survivorship' in Article 11-J; 'Homestead Occupancy Right- Qualifying Trust' in Article 11-M; and 'Conduit Trusts for Qualified Plans' in Article 11-N.

## Material Information - Trust (3/7)



### Material information

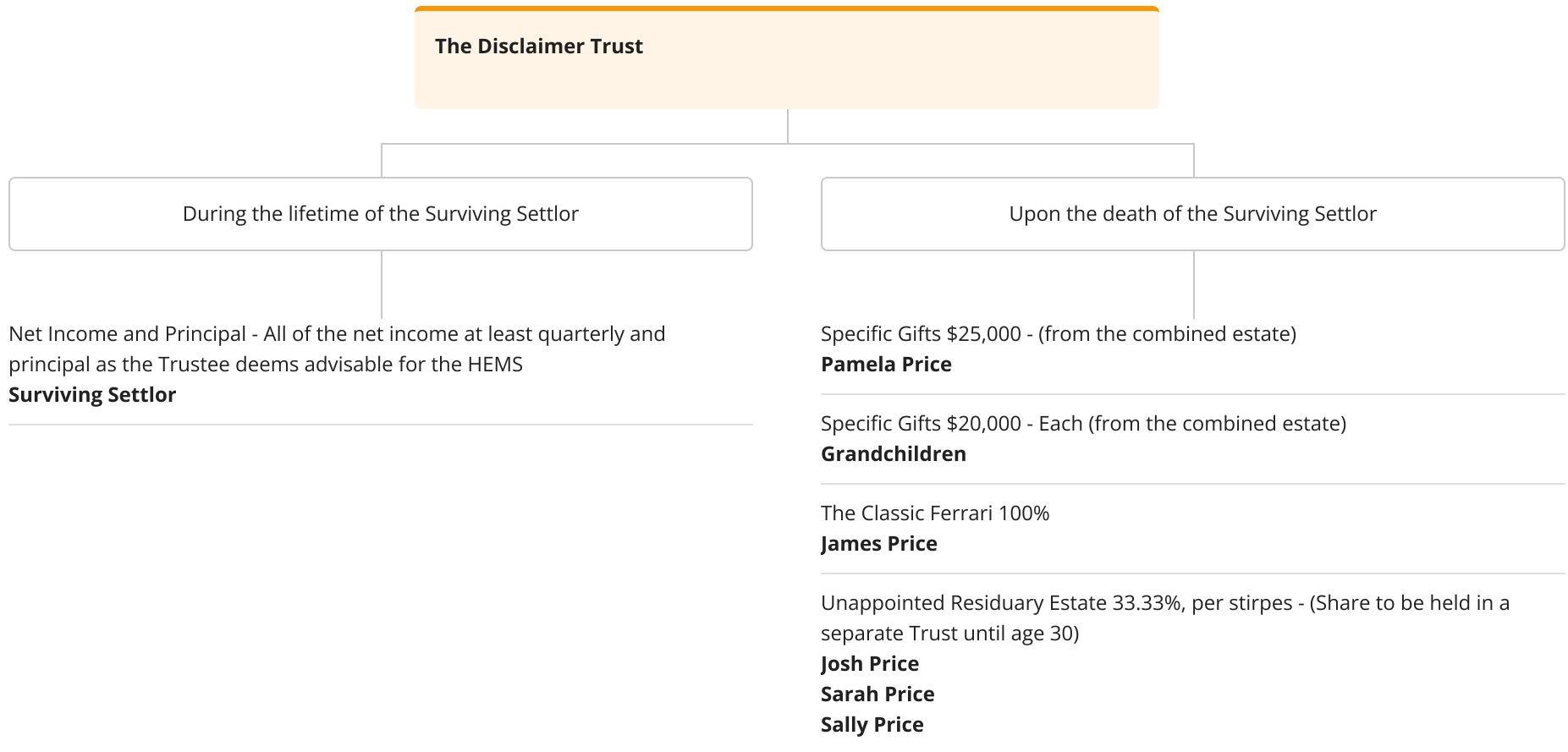
1. The Survivor's Trust is established after the death of the Deceased Settlor. The Trustee shall distribute the Surviving Settlor's Property to the Trustee of the Survivor's Trust and any property of the Deceased Settlor, not effectively disposed of by the Power of Appointment. (Pages 6 and 7, Articles 3-B and C and 4-A and C)

## Material Information - Trust (4/7)

### Material information

2. If any of the Deceased Settlor's Property is allocated to the Survivor's Trust due to the death of the Deceased Settlor, that property shall be held in a separate share of the Survivor's Trust ("Marital Share of the Survivor's Trust"). The Marital Share of the Survivor's Trust is intended to keep the Deceased Settlor's Property and any accumulated income separate from the balance of the Survivor's Trust in order to qualify as a designated beneficiary under qualified retirement plans and to prevent disqualification for the federal estate tax marital deduction under Section 2056 of the IRC. The Marital Share of the Survivor's Trust will be administered and distributed in the same manner as the Survivor's Trust, except that the Surviving Settlor may not amend the terms of the Survivor's Trust as they apply to the Marital Share of the Survivor's Trust and distributions made from the Marital Share of the Survivor's Trust while the Surviving Settlor is living may only be made to or for the benefit of the Surviving Settlor. The Surviving Settlor may direct that any or all assets held in the Marital Share of the Survivor's Trust be distributed to the Survivor's Trust. (Page 7, Article 4-C)
3. The Surviving Settlor has a general power of appointment over any or all of the principal or undistributed income of the Survivor's Trust. This is a general power of appointment that may be exercised in favor of any appointee, including the Surviving Settlor or the estate of the Surviving Settlor. (Page 8, Article 4-D)
4. If any person to whom a Specific Bequest is made does not survive the Settlor, then the gift to that person shall lapse and be distributed with the balance of the Residue. (Page 11, Article 6-A)

## Material Information - Trust (5/7)



### Material information

1. If the Surviving Settlor makes a disclaimer, or if the personal representative of the Surviving Settlor makes such a disclaimer on behalf of the Surviving Settlor after the death of the Surviving Settlor, then the Disclaimer Trust will be established (Page 8, Article 5-A)

## Material Information - Trust (6/7)

### Material information

2. The Surviving Settlor may disclaim any or all of the income distributions required to be made from the Disclaimer Trust and any undistributed net income shall instead be added to the principal of the Disclaimer Trust. But, the Trustee may still pay principal to the Surviving Settlor as the Trustee deems advisable for the HEMS. The Surviving Settlor may disclaim all interest in the principal and income of all or any portion of the Disclaimer Trust. Any property subject to such a disclaimer will be distributed as if the Surviving Settlor had died immediately after the Deceased Settlor. (Page 9, Article 5-C and D)

### Trust for Beneficiaries

#### Material information

1. Any distributions from the Residue to be distributed as a separate trust for each beneficiary, shall be held in Trusts. Each trust created to hold distributions from the Residue to a beneficiary shall be known as the "Trust for [Name of Beneficiary]" and the beneficiary for whom such trust is created shall be the "Current Beneficiary." (Page 10, Article 7-A)
2. The Trustee shall pay to or for the benefit of the Current Beneficiary all of the net income of that trust at least quarterly, and also principal for the HEMS of the Current Beneficiary, if the Trustee determines that the other income and resources known by the Trustee to be available to the Current Beneficiary are insufficient. Upon the Current Beneficiary reaching the age of 25, the Trustee shall, within a reasonable time, distribute one-half of the principal of the trust to the Current Beneficiary. Upon the Current Beneficiary reaching the age of 30, the trust shall terminate and the Trustee shall, within a reasonable time, distribute the entire balance of the trust, including the remaining principal and any undistributed income, to the Current Beneficiary. (Page 10, Article 7-B and C)
3. The Current Beneficiary has a general power of appointment over any or all of the principal or undistributed income of the trust. This is a general power of appointment that may be exercised in favor of any appointee, including the Current Beneficiary or the estate of the Current Beneficiary. This power may be exercised by the Current Beneficiary or any guardian, conservator, parent, or attorney in fact acting for the Current Beneficiary. (Page 10, Article 7-D)
4. If the Current Beneficiary dies before final distribution of the trust, the trust shall terminate and any remaining principal and undistributed income from the trust shall be distributed as the Current Beneficiary appoints, by exercising a power of appointment over any portion of the trust. The Trustee shall distribute any portion of the trust that has not been effectively appointed to the surviving descendants of the Current Beneficiary, per stirpes. If there are no surviving descendants of the Current Beneficiary, the Trustee shall distribute any portion of the trust that has not been effectively appointed to the heirs of the Current Beneficiary, as determined pursuant to applicable law. Any such distribution may be made subject to the provisions of Article 6. (Page 11, Article 7-E)

## Disclaimer

No representation or warranty, expressed or implied, is provided in relation to the fairness, accuracy, correctness, completeness or reliability of the information, opinions or conclusions expressed in any information provided by the FP Alpha application. The results shown should not be considered a comprehensive representation of financial projections and should not be relied on when making any financial decisions.

Plans and reports generated by FP Alpha do not provide financial, legal or tax advice, but may illustrate outcomes which are influenced by existing tax rules, historical financial data, and legal options. Plans and reports within FP Alpha are not a substitute for the advice of a legal professional, tax advisor, or financial advisor.

No recommendations or projections of specific investment, legal, or estate strategies are made or implied within the FP Alpha application. Any and all projections of asset growth or illustrations of estate planning strategies within FP Alpha are meant to demonstrate mathematical and financial planning concepts. FP Alpha plans and reports should not be relied upon as an accurate representation of your existing or future financial situations.

No representation or warranty, expressed or implied, is provided in relation to the fairness, accuracy, correctness, completeness or reliability of the information, opinions or conclusions expressed in any plan or reports. The results shown should not be considered a comprehensive representation of financial projections and should not be relied on when making any financial decisions. The results are inherently subject to substantial and numerous uncertainties and to a wide variety of significant business, economic, and competitive risks, and the assumptions underlying such results may be inaccurate in any material respect. Therefore, the actual results achieved may vary significantly from the results, and such variations may be material.

FP Alpha, Inc. ("FP Alpha") assumes no responsibility for any errors and omissions in, or the accuracy of, the data, documentation, or aggregated accounts obtained from users or external third parties. FP Alpha is not liable for the accuracy or reliability of any data that is generated and therefore populated by third parties within the FP Alpha application. Additionally, FP Alpha does not take responsibility for any failures or delays resulting from service interruptions of third-party providers. All downloads from this site are done at the users own risk and FP Alpha is not responsible for any resulting damage to your computer or any consequential loss of data.