



THERESA POOLED TRUSTS
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THERESA ALESSANDRA RUSSO FOUNDATION, INC.
THERESA THIRD PARTY COMMUNITY TRUST

Remainder Designated Beneficiary "Exhibit A"

Grantor's Distribution Instructions Upon the Designated Beneficiary's Death

(please attach additional signed sheets if necessary)

Upon the death of the Designated Beneficiary, and after first applying the Endowment Calculation below, the Trust shall terminate and the balance of the Trust property, including any accrued and undistributed income, shall be distributed according the following distribution instructions.

☐ To the following:

100% to _____

Other

___ % to _____

___ % to _____

___ % to _____

___ % to _____



Remainder Designated Beneficiary Exhibit "A"

Grantor's Distribution Instructions Upon the Designated Beneficiary's Death

In the event that the Designated Beneficiary is not survived by the above named Remainder Designated Beneficiary, or in the event the above distribution instructions should fail due to any reason whatsoever, then the Trust estate shall be distributed to those persons who would be the heirs of the Designated Beneficiary had the Designated Beneficiary died intestate.

For such purposes, distribution of the Trust estate shall be to those heirs as reasonably determined by the Trustee, in its sole discretion, according to the laws of descent and distribution for intestate estates of the State where the Designated Beneficiary last resided. In fulfilling its duties in this regard, the Trustee shall not impose unreasonable standards of genealogical proof but shall seek to distribute the Trust estate in the most practical and economical manner possible taking all then salient factors into consideration. The Trustee's determination shall be final and binding on all parties.

ENDOWMENT CALCULATION

Calculation of the Endowment: Upon the death of the Designated Beneficiary, and prior to following the Grantor's distribution directions above, ten percent (10%) of the then current value of the Trust sub-account shall vest in the Theresa Third Party Community Trust to be used in furthering the purpose of the Theresa Alessandra Russo Foundation, Inc. and/or similar not-for-profit corporations that serve people with disabilities.

Grantor

Name of Grantor (Print)

Dated: _____