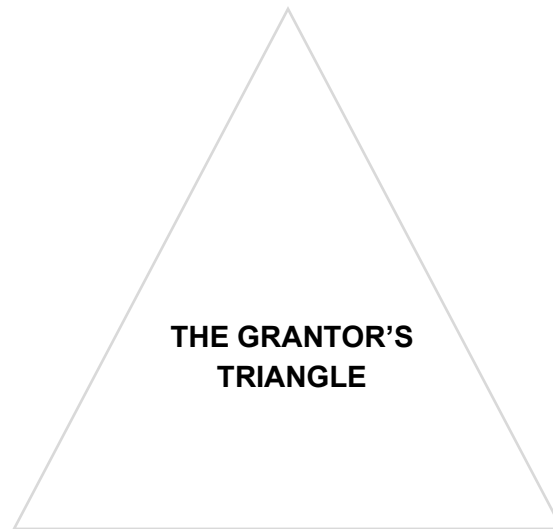


Who Is Involved?

Do your beneficiaries know the various advisors and individuals who would be represented in “The Grantor’s Triangle” below? Would they get along and/or work well together?

Trustees/Executor/Guardians/Trust Protector:



Beneficiaries:

Advisors:

Estate Planner: _____

Financial Advisor: _____

CPA: _____

Other Constituents (spouses, etc.):

Morgan Stanley

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