



EDWARD R. CASSEL & JEANNE M. CASSEL ESTATE PLANNING

SUMMARY OF DOCUMENTS AS OF OCTOBER 13, 2017

EDWARD R. CASSEL

DATE OF NAME OF
DOCUMENT DOCUMENT

10/13/2017 Last Will and Testament

PRs: Primary: Jeanne M. Cassel
 Successor(s): (1) Edward J. Cassel
 (2) Barbara Gruenwald
 (3) Robert J. Bahr

Beneficiary: Primary: (1) Jeanne M. Cassel
 Remainder: Edward R. and Jeanne M. Cassel Revocable Trust

JEANNE M. CASSEL

DATE OF NAME OF
DOCUMENT DOCUMENT

10/13/2017 Last Will and Testament

PRs: Primary: Edward R. Cassel
 Alternate(s): (1) Edward J. Cassel
 (2) Barbara Gruenwald
 (3) Robert J. Bahr

Beneficiary: Primary: Edward R. Cassel
 Remainder: Edward R. and Jeanne M. Cassel Revocable Trust

10/13/2017 Edward R. and Jeanne M. Cassel Marital Property Agreement

Will confirm "opt-in" to Wisconsin's Marital Property law & provide for non-probate transfer of any individually titled assets to Motz Revocable Trust at death of either/both spouses

10/13/2017 Edward R. and Jeanne M. Revocable Trust

Settlors: Edward R. Cassel & Jeanne M. Cassel
Trustees: Primary: Edward R. Cassel & Jeanne M. Cassel
 Successor(s): (1) Edward J. Cassel
 (2) Barbara Gruenwald
 (3) Robert J. Bahr

Beneficiaries: Primary: Edward R. Cassel & Jeanne M. Cassel, then upon death of first spouse to the surviving spouse
 Upon death of surviving spouse, \$1000 to **Shriners Hospitals**, remainder to Edward J. Cassel, or if he predeceases
 Remainder: Settlers, his share shall be retained in trust f/b/o living issue with distributions at 25 and 30
 Catastrophe: Equal shares to Robert Bahr, Margaret Hallett & Barbara Gruenwald, or their then living issue

10/13/2017 General Durable Power of Attorney (for Financial Matters)

POAs: Primary: Jeanne M. Cassel
 Successor(s): (1) Edward J. Cassel
 (2) Barbara Gruenwald
 (3) Robert J. Bahr

10/13/2017 General Durable Power of Attorney (for Financial Matters)

POAs: Primary: Edward R. Cassel
 Successor(s): (1) Edward J. Cassel
 (2) Barbara Gruenwald
 (3) Robert J. Bahr



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10/13/2017 Power of Attorney for Health Care

Primary: Jeanne M. Cassel
1st Successor: Edward J. Cassel
2nd Successor: Barbara Gruenwald
3rd Successor: Robert J. Bahr

JEANNE M. CASSEL

DATE OF NAME OF
DOCUMENT DOCUMENT

10/13/2017 Power of Attorney for Health Care

Primary: Edward R. Cassel
1st Successor: Edward J. Cassel
2nd Successor: Barbara Gruenwald
3rd Successor: Robert J. Bahr

10/13/2017 HIPAA Health Care Authorization

Agents: Jeanne + Edward Cassel, Jr. + Barbara + Robert

10/13/2017 HIPAA Health Care Authorization

Agents: Edward + Edward Cassel, Jr. + Barbara + Robert

optional Personal Property Memorandum

May be executed by Edward at any time to designate specific gifts of tangible personal property

optional Personal Property Memorandum

May be executed by Jeanne at any time to designate specific gifts of tangible personal property

optional Authorization for Final Disposition

Designates Edward's funeral/burial instructions, etc.

optional Authorization for Final Disposition

Designates Jeanne's funeral/burial instructions, etc.

10/13/2017 Designation of TOD Beneficiary (5307 Robin Dr., Greendale, WI Homestead)

Will ensure transfer of homestead to Revocable Trust without need for probate on death of second spouse to die

10/13/2017 Designation of TOD Beneficiary (1331-1331 1/2 Madison Ave., South Milwaukee, WI)

Will ensure transfer of property to Revocable Trust without need for probate on death of second spouse to die

10/13/2017 Designation of TOD Beneficiary (1333-1333 1/2 Madison Ave., South Milwaukee, WI)

Will ensure transfer of property to Revocable Trust without need for probate on death of second spouse to die

10/13/2017 Designation of TOD Beneficiary (1947 S. 77th St., West Allis, WI)

Will ensure transfer of property to Revocable Trust without need for probate on death of second spouse to die



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JEANNE M. CASSEL

DATE OF NAME OF
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10/13/2017 **Designation of TOD Beneficiary (3852-3854 S. Marcy St., Milwaukee, WI)**
Will ensure transfer of property to Revocable Trust without need for probate on death of second spouse to die

10/13/2017 **Designation of TOD Beneficiary (3855-3857 S. Marcy St., Milwaukee, WI)**
Will ensure transfer of property to Revocable Trust without need for probate on death of second spouse to die

10/13/2017 **Designation of TOD Beneficiary (919 Sherman Ave., South Milwaukee, WI)**
Will ensure transfer of property to Revocable Trust without need for probate on death of second spouse to die