
From: jeffrey E. <jeevacation@gmail.com>
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To: Richard Merkin

you will get two documents. 1 a will that says everything is put into a pour-over trust. . this keeps it confidential. the public has a right to see wills but not trusts. . it will have an executor whose only job is to see that the assets get put where they belong, taxes if any filed and paid. . the trust is the meat. it will have trustees or trustee. terms of all inside trust. beneficiaries= terms restrictions, investment goals. etc. trustee releases and responsibilities. . if there are private foundations . they will be designated, but the trustee should have most of the power so you don't try to dictate from the grave. . in the trust you can leave gifts to people if you so choose. keep the running of the biz and its successions leaders etc. it is one of the rare documents that needs two or three witnesses to your signature. . the trust is changeable. every day. but the idea is to form one, fill it. and then tweak each year or anytime you choose

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