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TRUSTEE AND DISTRIBUTION STANDARD CONTINUUM CHART

Beneficiary controls investment, administration and distribution decisions

Favors interests of current beneficiary over remainder beneficiaries

More professionalism in investment, administration and distribution decisions

Favors interests of remainder beneficiaries over current beneficiaries

Trustee:

Beneficiary

Standard:

All Income Discretionary Principal

Health, Maintenance Support Education

5/5 Power of Withdrawal

Trustee:

Beneficiary and Family Member as Co-Trustees

Standard:

All Income Discretionary Principal

Health Maintenance Support Education

Trustee:

Family Member

Standard:

Discretionary Income Discretionary Principal

Health Maintenance Support

Standard:

Discretionary Income Discretionary Principal

Corporate

Trustee:

Trustee: Beneficiary/Family Member and Corporate as Co- Trustees

Standard:

Discretionary Income Discretionary Principal

Health Maintenance