

## APPENDIX B

### Disclosure Concerning Attorney/Executor-Trustee

#### Acknowledgement of Disclosure

Prior to signing my Will, I was informed that:

- A. Subject to limited statutory exceptions, any person, including [my spouse,] [my child,] a friend, an associate or an attorney, is eligible to serve as my Executor and as my Trustee;
- B. Absent an agreement to the contrary, any person, including an attorney, who serves as my Executor is entitled to receive statutory commissions for executorial services rendered to my estate;
- C. Absent an agreement to the contrary, any person, including an attorney, who serves as my Trustee is entitled to receive statutory commissions for services rendered as a Trustee of the applicable trust;
- D. Absent the execution of this document, the attorney who prepared my Will, a then-affiliated attorney or an employee of such attorney or of a then-affiliated attorney who serves as my Executor would be entitled to receive one-half of the commissions that he or she otherwise would be entitled to receive; and
- E. If such attorney serves as my Executor and/or Trustee, and if my attorney, another attorney or the law firm affiliated with such attorney renders legal services in connection with my Executor's and/or my Trustee's official duties, my attorney or the law firm that renders those services will be entitled to receive just and reasonable compensation for those legal services, in addition to the commissions to which my Executor and/or my Trustee will be entitled.

Dated: \_\_\_\_\_, 20\_\_\_\_\_

Name of Testator

\_\_\_\_\_

\_\_\_\_\_  
Witness

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Witness

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Print Name

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Print Name

Sample

Sample