TABLE OF
MISCELLANEOUS FORMS

FORM 401: IRREVOCABLE INSURANCE TRUST AGREEMENT
– Single Life Insurance Policy

FORM 402: IRREVOCABLE INSURANCE TRUST AGREEMENT
– Second-to-Die Life Insurance Policy

FORM 403: CHARITABLE REMAINDER UNITRUST
UNDER REVOCABLE AGREEMENT OR WILL

FORM 404: CHARITABLE REMAINDER ANNUITY TRUST
UNDER REVOCABLE AGREEMENT OR WILL

FORM 405: CHARITABLE REMAINDER UNITRUST
UNDER IRREVOCABLE AGREEMENT – One Settlor

FORM 406: CHARITABLE REMAINDER ANNUITY TRUST
UNDER IRREVOCABLE AGREEMENT – One Settlor

FORM 407: CHARITABLE REMAINDER UNITRUST
UNDER IRREVOCABLE AGREEMENT – Community Property

FORM 408: CHARITABLE REMAINDER ANNUITY TRUST
UNDER IRREVOCABLE AGREEMENT – Community Property

FORM 409: QUALIFIED DOMESTIC TRUST

FORM 410: GIFT TRUST AGREEMENT – One Settlor

FORM 411: GIFT TRUST AGREEMENT – Community Property