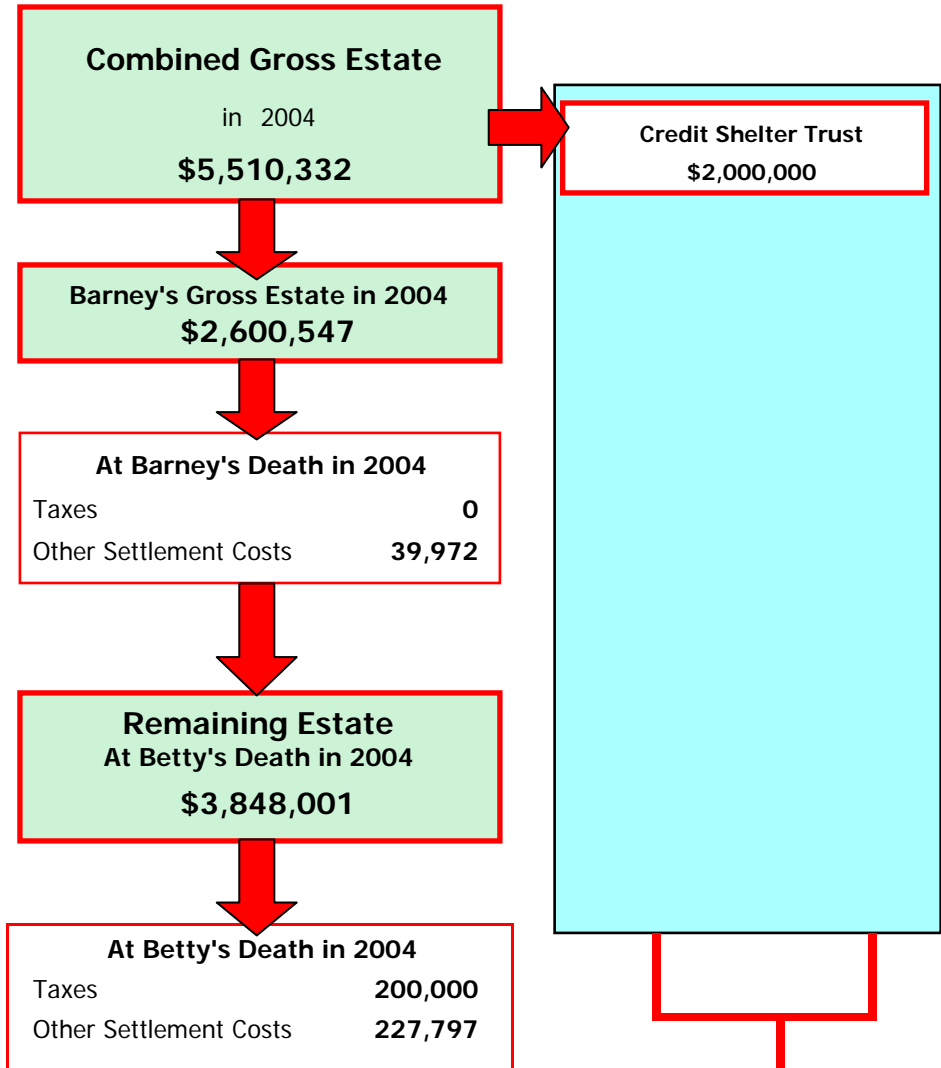


# ESTATE PLANNING

## Barney & Betty Rubble - Financial Planning - Current Status

Full Mar Ded w/ Max Exclusion

### ESTATE PLANNING FLOWCHART Barney and Betty die now - Barney first



|   |           |
|---|-----------|
| <b>At Betty's Death, Distribution to Heirs and/or Charity</b> |           |
| Barney's Credit Shelter Trust                                 | 2,000,000 |
| Betty's Net Estate  | 2,097,506 |
| <b>Total Heirs</b>  | 5,365,160 |
| <b>Total to Heirs and Charity</b>                             | 6,120,160 |