



Follow up steps to making a will:

After completing your last will, there are several important follow-up steps that should be taken to ensure its effectiveness and proper implementation:

Review and Proofread

Before finalizing anything, thoroughly review your will for accuracy and completeness. Ensure that your intentions are clearly stated and that all necessary details are included.

Sign the Will Properly

To ensure the legality of your will, remember to have it signed by two witnesses who are not recipients of the will and are at least 18 years old. The U.S. Will Registry provides a convenient link to an online notary on our home page for your convenience.

Securely Store Your Duplicate Copy Online

It is essential that your will is stored in a safe and protected location to ensure its security. The U.S. Will Registry provides a link on our home page to [SideDrawer.com](https://www.SideDrawer.com), a private and secure online platform, making sure your will is never lost or removed.

Register Your Will Free

Registering your will with The U.S. Will Registry is a complimentary service that ensures the location of your will can be easily identified when necessary. The registration securely records the whereabouts of both your original copy and duplicate. Access to this information is restricted to those listed on your registration. Such access becomes available only upon submission of a death certificate and valid identification.

Review and Update Your Will annually for any changes or updates

The U.S. Will Registry offers the convenience of annual email reminders to update your will. Regularly reviewing your will on an annual basis ensures it accurately reflects your wishes and stays current with any changes or updates.

Attorney Consultation: If you're uncertain about any aspect of your will or want to ensure its legality, consider consulting an attorney who specializes in estate planning.

*Additional Estate Document forms can be found on the home page of The U.S. Will Registry

LAST WILL AND TESTAMENT
OF
Karen Ann Stone

I, Karen Ann Stone, residing at 3240 East Huron Street, Missouri Valley, Iowa, 51555, Benton County, do hereby state that this is my Last Will and Testament, and I revoke all prior Wills and Codicils. This Last Will and Testament was created on 01/15/2024.

FAMILY INFORMATION

As of the date of this Will, I am not married.

As of the date of this Will, I do not have children.

DIRECTIVES CONCERNING THE CARE OF PETS

As of the date of this Will, it is my request that provisions are made for my pet(s) for the remainder of their lives and that those chosen use any specified bequests for that purpose.

My pets are Tropical Fish Tank (Fish), Rocky Parot (Bird) and Rambo German Shepard (Dog).

The chosen caretakers are as follows:

- Paul Brown (Friend) is designated as the primary caregiver for my pets, Tropical Fish Tank (Fish) and Rocky Parot (Bird) for the duration of their life. In the event that the primary caregiver is unavailable, I hereby appoint Richard Lewis (Friend) to take care of my pets, Tropical Fish Tank (Fish) and Rocky Parot (Bird).

I wish to express my gratitude to the devoted caretaker of my beloved pet(s) mentioned by offering them a heartfelt gift of \$3,000.

- Marcy Turner (Sibling) is designated as the primary caregiver for my pet, Rambo German Shepard (Dog) for the duration of its life.

I wish to express my gratitude to the devoted caretaker of my beloved pet(s) mentioned by offering them a heartfelt gift of \$3,000.

SPECIFIC BEQUESTS PROVISIONS

I leave the following specific items to the person(s) or organization(s) below:

Initials:

- The bequeathed item(s), My Safire Necklace and all my cookware and personal belongings to my niece, will be given to Leslie Weiss (Relative). If Leslie Weiss does not survive me, then the gift(s) will be given to Marcy Turner (Sibling).
- The bequeathed item(s), My car and condo and gold necklace with 4 small diamonds, will be given to Marcy Turner (Sibling).

DISPOSITION OF RESIDUAL ESTATE

All of my residual estate will be distributed to the following beneficiaries in the specified portions:

As a heartfelt way to establish an enduring legacy: I would like to leave:

- A. **20%** share to be distributed to **American Foundation for Suicide prevention**, a non-profit organization.
- B. **80%** share to be distributed to **Marcy Turner** (Sibling).
 - a. If Marcy Turner (Sibling) does not survive me, the share of Marcy Turner (Sibling) shall be distributed to following beneficiaries in noted percentage:
 - i. 100% share to be distributed to **Leslie Weiss** (Relative) .

If a mentioned charitable organization is no longer operating, its share will be given to the organization that succeeds in its interests. In the event the charity ceases to exist completely, the portion intended for that organization will be divided among the remaining beneficiaries.

If at any time no person or entity is qualified to receive a final distribution of any part of my residual estate, I give, devise, and bequeath that portion of my residuary estate to those persons who would inherit it had I then died intestate owning the property, as determined and proportioned under the laws of Iowa then in effect.

DISPUTE RESOLUTION

If any disagreements or disputes arise regarding the distribution of my assets or the terms of this will, I request that the involved parties first attempt to resolve them through:

In the event of disputes among beneficiaries regarding the distribution of my estate, a no-contest clause is invoked. Any person attempting to contest the validity of my Will, including any codicil, or initiating legal proceedings to set it aside, will forfeit their share, lose all rights or interests in my estate, and be considered, for the purposes of my Will, to have predeceased me.

DESIGNATION OF EXECUTOR

Initials:

I hereby appoint Marcy Turner (Sibling) as Executor/Personal Representative of this Last Will & Testament.

Should the aforementioned individual be unavailable, unwilling or unable to serve as Executor/Personal Representative, then I hereby nominate Barry Zipper (Friend) as the alternate Executor/Personal Representative of this Last Will & Testament.

Immediately following my death, the Executor/Personal Representative will be authorized to exercise all provisions of this Last Will & Testament and to use the assets from my estate to make all necessary arrangements, without any unnecessary delay, for the payment of personal debts, obligations and funeral expenses.

PERFORMANCE BASED EXECUTOR COMPENSATION

The compensation of the executor shall be contingent upon their diligent performance and satisfactory fulfillment of all duties related to estate administration. In the event that the executor successfully meets all obligations and settles the estate in accordance with the terms outlined in this will, they shall be entitled to receive compensation of \$2,500 for their representation and work on behalf of my estate.

POWERS OF EXECUTOR

A. **General Grant of Powers:** My appointed Executor shall possess all the powers necessary for the proper administration of my estate and the execution of this Will.

B. **Specific Powers:** In addition to the general grant of powers, my Executor is specifically authorized to:

- Manage and distribute all assets, properties, and funds of my estate.
- Sell, transfer, or otherwise dispose of any real or personal property belonging to my estate as deemed necessary.
- Pay all my outstanding debts, liabilities, funeral expenses, and testamentary charges.
- Invest and reinvest funds of my estate in any lawful investments, without being limited by statute or rule of law.
- Enter into contracts, agreements, and transactions on behalf of my estate to carry out its administration and settle any claims.
- Hire and employ attorneys, accountants, and other professionals, as well as assistants, to aid in the proper management and settlement of my estate.
- Exercise any voting rights, hold stock, and participate in the management of any business or entity in which my estate has an interest.
- Resolve, settle, or contest any claims or disputes that may arise regarding my estate.
- Take any actions necessary to protect, preserve, and enhance the value of my estate.

Initials:

- C. **Limitations:** I impose no limitations on my Executor's powers, except where specific assets or properties are bequeathed or designated in this Will to be held, distributed, or managed separately.

I trust my appointed Executor to carry out the responsibilities entrusted to them diligently and in accordance with the intentions stated in this Will.

MISCELLANEOUS PROVISIONS

- A. **Numbers and Genders and Paragraph Names:** The provisions of this Will are given regardless of gender or number. When reference is made to a plural expression it shall include a singular expression alongside it when the context and information requires, and vice versa. An example of this would be the words "child" and "children". When reference is made to a particular gender, this reference will extend to and include all genders. Paragraphs in this Will are given names for the purpose of easy referencing. These names should not be construed as a part of this Will, and therefore, should not be used to interpret the requests and provisions made in this Will.
- B. **Liability of Fiduciary:** Any person acting without fraudulent conduct or bad faith, as a fiduciary for me is not considered liable individually to any beneficiary of my estate. My estate is responsible for compensating the fiduciary for any and all claims and expenses incurred while acting on my behalf with good faith actions or lack of actions. This is required unless the actions or lack of actions of the fiduciary are proven to be fraudulent or in bad faith. If there are successor trustees of my estate, they are not required to research or be accountable for any of the previous administrations of my estate.
- C. **Executor's Exoneration & Responsibilities:** The Executor of my estate is exonerated from personal liability and is responsible for payment of reasonable expenses incurred by my estate and trust. The Executor is also tasked with overseeing any changes made to my estate and trust. Furthermore, the Executor shall receive reasonable compensation for representing me and working on behalf of my estate, along with reimbursement for reasonable expenses incurred.
- D. **Bond:** My Executor is not required to give any bond, surety, or security to any court.
- E. **Ancillary Clause:** In the event that assets or property are owned by the individual in various locations and the primary (domiciliary) executor named in the will is unable or unwilling to manage them in those areas, the primary executor is granted the authority to designate an alternate person (ancillary executor) or entity to handle those assets. This chosen individual or entity will possess equivalent powers and responsibilities as granted to the primary executor in the will. The primary executor also has the discretion to delegate to the chosen alternate executor any powers originally granted to the primary executor, as deemed appropriate. This includes the

option to serve without the requirement of a bond or surety on bond. The resulting profits from managing the assets in those locations will be transferred to the primary executor.

- F. **Applicable Law:** The validity and construction of my Will will be determined by the laws of the State of Iowa.
- G. **Severability:** If any part of this instrument is determined to be void or invalid, the remaining provisions will continue in full force and effect.

Initials:

FUNERAL AND FINAL RESTING PLACE INSTRUCTIONS

At the time of drafting this Last Will and Testament, I have not made any prior funeral arrangements for myself.

PRIOR TO SIGNING THIS DOCUMENT

1. Make sure each page is numbered and initialed by the will Maker on the bottom of each page (not including the witness page).
2. Selecting two qualified witnesses is crucial to ensure the validity and legality of your will.
3. In the event that the individual creating the Will is unable to sign due to physical disability, they have the option to appoint another person to sign on their behalf, provided the Will writer is present. It is advisable to consult with an attorney if you believe this step is required.
4. It is advised that a "Self-Proving" affidavit is attached to this Last Will. By adding a self-proving affidavit, the need for witness testimony can be avoided, so beneficiaries and loved ones can receive their assets faster after you die. To get an affidavit you will need to gather your witnesses and sign in front of a notary public to have the document notarized.
5. This Will is not designed to reduce taxes.
6. In the event you make a new will, make certain you destroy this version or any previous version to avoid any legalities or confusion.

This Will has been created at TheUSWillRegistry.org

DISCLAIMER:

- *The U.S. Will Registry does not provide legal advice and is not a law firm.*
- *It is advised that you contact an estate attorney to have this will reviewed to make sure it meets your state guidelines, or if you have a complicated estate.*

WITNESS PAGE

Witnesses to the signing of this Last Will, are testifying that:

- a. The Maker of this will is signing this document as a free and voluntary act.
- b. All present (including the Testator) are of minimum age (in most states 18).
- c. Will Maker is of "**sound mind**" defined by legally having the capacity to think, reason, and understand for oneself.
- d. No witness is a beneficiary in the will.
- e. All are present and eye witness during the actual signing of this will .

INITIALS FOR WITNESSES for Statements (a) - (e) above

1. _____ 2. _____

IN WITNESS THEREOF: I declare this to be my Last Will and Testament, written upon this preceding (#)_____ pages, and subscribed by Karen Ann Stone on this ____/____/_____.

SIGNED by the Testator, _____ as their last will, in our presence, both being present at the same time. We, at their request and in their presence, and in the presence of each other, have subscribed our names as witnesses.

X _____
(Karen Ann Stone, Testator)
Date: ____/____/_____

1.	_____	X	_____	_____
	Witness Name (Print)		Witness Signature	Date
	_____		_____	
	Email		Phone	

2.	_____	X	_____	_____
	Witness Name (Print)		Witness Signature	Date
	_____		_____	
	Email		Phone	

SELF PROVING AFFIDAVIT

STATE OF IOWA
COUNTY BENTON

I, Karen Ann Stone, declare to the officer taking my acknowledgment of this instrument, and to the subscribing witnesses, that I signed this instrument as my Last Will and Testament.

Karen Ann Stone, Testator

We, _____, and _____, have been sworn by the officer signing below, and declare to that officer on our oaths that the Testator declared the instrument to be the Testatrix's Last Will and Testament and signed it in our presence and that we each signed the instrument as witness in the presence of the Testator and of each other.

Witness 1: _____ / ____/____

Witness 2: _____ / ____/____

Acknowledged and subscribed before me by means of physical presence or online notarization, by the Testator, Karen Ann Stone, who is personally known to me or who has produced _____ as identification, and sworn to and subscribed before me by the witnesses, _____ who is personally known to me or who has produced _____ as identification, and _____ who is personally known to me and subscribed by me in the presence of the Testatrix and the subscribing witnesses, all on ____/____/20__.

Expiration Date

Signature of Notary Public

(Seal)