STATE OF TENNESSEE

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IN RE: ***THOMAS I CARLTON JR.***

Docket No: ***23P895***

Karen Johnson Davidson County
Batch # 1178297 WILL
09/06/2024 08:13:32 AM 8 pgs
Fees: $42.00 Taxes: $0.00
20240906-0068537

I, JOSEPH P. DAY, Clerk of the Circuit Court for Davidson County, in the State aforesaid, do hereby certify that the foregoing is a true and correct copy of the document heretofore entered in the above styled case on May 23, 2023 in the Seventh Circuit Court for Davidson County, Tennessee, as same remains of record in the Minutes of said Court.

IN TESTIMONY WHEREOF, I hereunto subscribe my name and affix the seal of said Court, at office, in Nashville, on September 5, 2024.

JOSEPH P. DAY CIRCUIT COURT CLERK

JOSEPH P. DAY, Clerk,

By: _____
Deputy Clerk

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LAST WILL AND TESTAMENT OF THOMAS I. CARLTON, JR.

I, Thomas I. Carlton, Jr., a resident of Nashville, Davidson County, Tennessee, being of sound mind and disposing memory, hereby make and declare this to be my Last Will and Testament, revoking all Wills and Codicils heretofore made by me.

FILED
MAY 18 2023
JOSEPH P. DAY, Clerk
By Deputy

ITEM I.

I direct that my Executor, hereinafter named, pay all of my just debts (including any mortgage or indebtedness on any real property but excluding the repayment of any loan on any life insurance policy I may own), the expense of my last illness and funeral, the cost of administering my estate and any taxes due at or after my death out of my residuary estate. I also direct my Executor to pay out of my residuary estate the cost of any headstone or grave marker selected by my wife and daughter to be placed at my grave in Calvary Cemetery.

ITEM II.

I make the following specific bequests:

A. Five Thousand and No/100 Dollars ($5,000.00) to The Reverend Joe Pat Breen to help him continue his ministry of providing for those who are in need, if he survives me. If he fails to survive me, then this bequest shall lapse and the amount of this bequest shall become part of my residuary estate;

B. To Father Ryan High School in Nashville, Tennessee, the amount of Five Thousand and No/100 Dollars ($5,000.00) to be used for Tuition Assistance;

C. One Thousand and No/100 Dollars ($1,000.00) to the Brandon Anderson Special Needs Trust, c/o Judy Anderson, Trustee;

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D. To each of my four stepchildren, Ellis (Joby) Saad, Suzette Ervin, Jonathan Saad, and Sabra Love, I leave the amount of Five Thousand and No/100 $5,000.00) to each stepchild that survives me. If any such stepchild shall predecease me, then the bequest to that stepchild shall lapse and become part of my residuary estate.

D. One Thousand and No/100 Dollars ($1,000.00) for Masses to be said for the repose of my soul by such priests or at such churches as my daughter, Katie Carlton Long, my sister, Mary Catherine Choyce, and my wife, Kathleen Rowan Carlton, shall select;

E. To my wonderful children, whom I love dearly, Katie Carlton Long, and Thomas I. Carlton, III, all of my personal effects, including but not limited to my office furnishings, photographs, clothing, books, luggage, camera, my chest of drawers located in the master bedroom, including all contents therein, my bedside table located in the master bedroom and all contents therein and the entire contents of my closet in the master bedroom;

F. To my son, Thomas I. Carlton, III, to my brother-in-law, Kenneth T. Choyce, Sr. and to my nephew, Kenneth T. Choyce, Jr., equally, my walking cane collection, to the extent they may want any of them; and,

G. To my wife, Kathleen Rowan Carlton, all household furnishings, personal effects and motor vehicles not bequeathed in Items II E and F above.

ITEM III.

I give, devise and bequeath to my wife, Kathleen Rowan Carlton, all of my interest in the real property at 102 Glendower Court in Nashville, Davidson County, Tennessee, if she survives me by more than ninety (90) days. If my wife predeceases me or fails to survive me by more than

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ninety (90) days, this bequest shall lapse and the real property shall be sold by my Executor and the proceeds distributed as part of my residuary estate. In the event of a simultaneous death by my wife and me, it will be presumed that I survived my wife.

ITEM IV.

All the rest and remainder of my probate estate, of whatever nature and wherever located, I devise and bequeath to my wife, Kathleen Rowan Carlton, if she survives me by more than ninety (90) days. If my wife predeceases me, or fails to survive me by more than ninety (90) days, this bequest shall lapse and the amount distributed equally between my daughter and my son or their beneficiaries as follows:

A. Fifty percent (50%) to my daughter, Katie Carlton Long, if she survives me. Should my daughter, Katie Carlton Long, predecease me, then her share shall be distributed to her issue *per stirpes*; and,

B. Fifty percent (50%) to my son, Thomas I. Carlton, III, if he survives me. Should my son, Thomas I. Carlton, III, predecease me, then his share shall be distributed to his issue *per stirpes*.

If any beneficiary of this will or of any life insurance policy or investment passing outside this will is less than twenty one (21) years of age at the time of my death, then said bequest shall be paid to the parent or guardian of said beneficiary to be held in separate trusts for each beneficiary by the parent or guardian as trustee, to be used exclusively for the education, health and welfare of the beneficiary. No bond shall be required of the parent or guardian, nor shall the parent or

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guardian be required to make any accounting to the Court or beneficiary. The trust for each such beneficiary shall terminate upon the beneficiary becoming twenty one (21) years of age and the then remaining trust funds, together with any accumulated interest, shall be paid to the beneficiary, if living, otherwise to his or her siblings then living in equal shares.

ITEM V.

I appoint my daughter, Katie Carlton Long, and my son, Thomas I. Carlton, III, as Executors of this, my Last Will and Testament, without bond. If either my son or daughter is unable or unwilling to serve, I appoint the remaining child as my Executor/Executrix, likewise without bond. My Executor/Executrix shall not be required to file any inventory or make any accountings with any court. My Executor/Executrix and the trustees above specified shall have all those duties, powers and discretions granted by law, and those set forth in Tenn. Code Ann. § 35-50-110, which is incorporated herein by reference.

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IN WITNESS WHEREOF, I have executed this, my Last Will and Testament, consisting of four (4) pages, each of which is identified by my signature thereon, this 9th day of May, 2022.

Thomas I. Carlton, Jr.

Signed by the said Thomas I. Carlton, Jr. as and for his Last Will and Testament, in the presence of us, the undersigned, who at his request and in his sight and presence, and in the presence of each other, have subscribed our names hereto as attesting witnesses, on the day and date above written.

Betty S. Mages of Nashville, TN

Ashli R. Jones of Nashville, TN

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STATE OF TENNESSEE)
)
COUNTY OF DAVIDSON)

We, the undersigned, being first duly sworn, do hereby make oath that Thomas I. Carlton, Jr., on the 9th day of May, 2022, declared to us that the foregoing instrument dated May 9, 2022, was his Last Will and Testament; that he then signed the said instrument in our sight and presence; that we, at his request and in his sight and presence, and in the sight and presence of each other, subscribed our names to such instrument as attesting witnesses; that at the time of the execution, the said Thomas I. Carlton, Jr. was of sound mind and disposing memory and did not appear to be under any undue influence; and that the undersigned make oath that they are more than eighteen (18) years of age.

Betty S. Magee

Stella R. Gross

Sworn to and subscribed
before me this 9th
day of May,
2022.

Donna M Barker
Notary Public

DONNA M. BARKER
STATE OF TENNESSEE NOTARY PUBLIC
DAVIDSON COUNTY

My Commission Expires:

7/7/25

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