Personal Estate Inventory

A Personal Record of Assets and Obligations for

__________________________
By maintaining a comprehensive record of your personal affairs, you can keep important information available for easy access. In times of emergency, it is important that you, and your family, be able to take immediate action with regard to financial affairs.

Also, an inventory is invaluable when death occurs.

This booklet can be as comprehensive as you deem necessary. Advise family members of this record, and where it is kept. Once-a-year update is advised.

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What to Keep in Your Safe Deposit Box or Other Safe Place

What to keep permanently
- Birth Certificate
- Will
- Marriage Record
- Social Security Card
- Paid Mortgage or Loan Contracts
- Real Estate Deeds
- Records of jointly owned property
- Other real estate papers

What to keep for 7 years
- Savings pass book (after closed)
- Cancelled checks
- Check stubs
- Bank statements
- Receipted bills and sales slips
- Property investment records

For 10 years
- Income tax records

While in force
- U.S. Savings Bonds
- Warranties and instruction books

During ownership (plus 7 years)
- Stocks and bonds records

Other
- Insurance policies (consult agency)

Additional Information

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Other Personal Property

I own the following types of personal property:

- [ ] Automobile
- [ ] Machinery
- [ ] Boat
- [ ] Sports Equipment
- [ ] Hobby Equipment
- [ ] Tools
- [ ] Heirlooms/Antiques
- [ ] Valuable Collections (Art, books, coins, gems, minerals, stamps, etc.)
- [ ] Household Furnishings
- [ ] Jewelry
- [ ] Clothing
- [ ] Recreational Vehicles
- [ ] Other (list) _________________________________________________

An itemized inventory of this property, including item name, description, location and name of joint owner (if any) can be found at: ____________________________

Importance of Last Will and Testament

The information you enter in this book will be of value to family and personal representatives in the event of your death. It will not, however, determine the disposition of your property. Only your Last Will and Testament can do that. If you do not have a Will, you may wish to consult your attorney and arrange to prepare one.

I have a Will, which was prepared on ______________________________ (date)
Located at _______________________________________________________
Executor(s) ______________________________________________________
Address/Telephone ________________________________________________

Living Will Information

Pennsylvania state law (Act 24 of 1992) now provides for implementation of a Living Will, which details the wishes of a person pertaining to the extent of life preserving efforts he or she wants extended in the event of terminal illness or complete incapacity. If you have made a decision on this matter, it is important that your wishes be put in writing. Because of the complexities of this issue, it is wise to consult an attorney on the matter of a Living Will.

I have a LIVING WILL, which was prepared on______________________ (date)
Located at _______________________________________________________
Surrogate(s) _____________________________________________________
Address/Telephone ________________________________________________
Personal Data

Date of Birth _____________________________________________________

Place of Birth _____________________________________________________

________________________________________________________________
________________________________________________________________
________________________________________________________________
_________ (country, state, city, county, township)

Location of Birth Certificate________________________________________

Naturalization Papers ______________________________________________

Location of Marriage Certificate _______________________ Date __________

Location of Divorce Papers___________________________ Date __________

Social Security Number _____________________________________________

Name of Spouse___________________________________________________

Address _________________________________________________________

Names of Children/Addresses ________________________________________

________________________________________________________________
________________________________________________________________
________________________________________________________________

Name of Father ___________________________________________________

Date of Birth ______________________________ Date of Death___________

Name of Mother (Maiden) __________________________________________

Date of Birth ______________________________ Date of Death___________

Names of Brothers/Sisters ___________________________________________

________________________________________________________________
________________________________________________________________
________________________________________________________________

Company/Bank Name _______________________________________________

Address _________________________________________________________

Date Bought ______________________Certificate # _____________________

# Shares_______________ Price $ _____________ Amount $ _____________

Location of Certificate ______________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________

Company/Bank Name _______________________________________________

Address _________________________________________________________

Date Bought ______________________Certificate # _____________________

# Shares_______________ Price $ _____________ Amount $ _____________

Location of Certificate ______________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________

Company/Bank Name _______________________________________________

Address _________________________________________________________

Date Bought ______________________Certificate # _____________________

# Shares_______________ Price $ _____________ Amount $ _____________

Location of Certificate ______________________________________________

Custodian Bank___________________________________________________

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Company/Bank Name _______________________________________________

Address _________________________________________________________

Date Bought ______________________Certificate # _____________________

# Shares_______________ Price $ _____________ Amount $ _____________

Location of Certificate ______________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________

Company/Bank Name _______________________________________________

Address _________________________________________________________

Date Bought ______________________Certificate # _____________________

# Shares_______________ Price $ _____________ Amount $ _____________

Location of Certificate ______________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________
Individual Retirement Accounts (IRA's)

Company/Bank Name ____________________________________________
Address _______________________________________________________
Date Bought ______________________Certificate # ____________________
# Shares_______________ Price $ _____________ Amount $ _____________
Location of Certificate __________________________________________
Custodian Bank_________________________________________________
Address _______________________________________________________

Company/Bank Name ____________________________________________
Address _______________________________________________________
Date Bought ______________________Certificate # ____________________
# Shares_______________ Price $ _____________ Amount $ _____________
Location of Certificate __________________________________________
Custodian Bank_________________________________________________
Address _______________________________________________________

Company/Bank Name ____________________________________________
Address _______________________________________________________
Date Bought ______________________Certificate # ____________________
# Shares_______________ Price $ _____________ Amount $ _____________
Location of Certificate __________________________________________
Custodian Bank_________________________________________________
Address _______________________________________________________

Military Service

Branch of Service ______________________________________________
Dates of Service From____________________ To____________________
Service No._____________________________________________________
Discharge Papers Located at: ______________________________________
G.I. Insurance Policy No.________________________________________
VA Claim No. __________________________________________________

Federal Benefits for orphans and widows of veterans are as follows:
  · Burial in national cemeteries
  · Burial flag for veterans (obtain at Post Office)
  · Burial expense reimbursement
  · Compensation for widows and orphans if death was not service connected
  · Pension for widows and minor children if death was not service connected
  · Parent’s compensation
  · Children’s Education – for children of veterans whose death was service con-
    nected or who are 100% disabled
  · Home loans for widows-unremarried widows of veterans who die of service
    connected causes are eligible for G.I. Home Loan
  · Headstone or Gravemarker

For information, contact the Regional Veterans’ Administration offices in
Philadelphia and Pittsburgh or V.A. contact offices located throughout the state in
larger communities. Veterans’ organization service officers and county directors
of veterans offices are also qualified to provide benefit information and service.

State Benefits for widows and orphans are as follows:
  · Emergency financial aid for needy widows
  · Scholarship assistance for children of veterans whose death was service con-
    nected or who are 100% disabled
  · Real estate tax exemption for needy unremarried widows of veterans who
    were 100% disabled

For information or assistance in applying for State benefits, contact the local
County Director of Veterans’ Affairs.
Safe Deposit Box
A safe deposit box is an inexpensive form of protection for important papers and records against fire and theft. Certain items can not be replaced once lost or destroyed.

Bank ___________________________________________________________
Address _________________________________________________________
Box No. ___________________________ Key No. _________________
Those having access to box _________________________________________
Location of key __________________________________________________
Contents of box as of: _____________________________ (date)

_________________________ ____________________________________________________________________________

_________________________ ____________________________________________________________________________

_________________________ ____________________________________________________________________________

Professional Advisors
Attorney _________________________________________________________
Address _________________________________________________________
Phone __________________________________________________________
Trustee __________________________________________________________
Address _________________________________________________________
Phone __________________________________________________________
Executor(s) _____________________________________________________
Address _________________________________________________________
Phone __________________________________________________________

Burial Information
Cemetery Plot owned at ____________________________________________
Deed located at __________________________________________________
I have given information regarding my funeral

☐ Will ☐ Letter ☐ Other

Tax Returns
Copies of tax returns are often needed in preparing returns for settling an estate.

Copies of income tax returns are located _____________________________
Current tax information located______________________________________

_________________________ ____________________________________________________________________________
Thousands of dollars are lost each year in unclaimed bank accounts by unknowing families who did not have knowledge of the accounts.

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<tr>
<th>Bank/Credit Union/Savings &amp; Loan</th>
<th>Address</th>
<th>Account No.</th>
<th>Location of Book</th>
<th>Type of Account</th>
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Real Estate Improvements

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<th>Date</th>
<th>Description</th>
<th>Cost</th>
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## Securities

Valuable rights are often lost because the owners of stock certificates and bonds cannot be located. Records of Purchase and Sale, etc., are needed for tax purposes.

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<tr>
<th>Company Name</th>
<th>Common</th>
<th>Preferred</th>
<th>Bond</th>
<th>Debenture</th>
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<tbody>
<tr>
<td>Date Bought</td>
<td>Certificate #</td>
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<tr>
<td>Unit Price $</td>
<td># Shares</td>
<td>Amount $</td>
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### Description

- **Location of Property**
- **Purchase Price**
- **Deed Amount**
- **Amount of Mortgage**
- **Type**
- **Mortgage Payments $**
- **Name of Mortgagor**
- **Address**
- **Property Leased to**
- **Address**
- **Gross Income $**
- **Insurance on Property**
Real Estate

Description _______________________________________________________

Location of Property _______________________________________________

Purchase Price _______________________ Date________________________

Deed Amount __________________ Location of Deed____________________

Amount of Mortgage_______________________________________________

Type ___________________________________________________________

Mortgage Payments $ _____________________________________________

Name of Mortgagor________________________________________________

Address _________________________________________________________

Property Leased to_________________________________________________

Address _________________________________________________________

Gross Income $ ___________________________________________________

Insurance on Property _____________________________________________

Company Name __________________________________ Common Preferred Bond Debenture

Date Bought ______________________ Certificate # ____________________

Unit Price $ _______________ # Shares ______________ Amount $________

Location of Certificate _____________________________________________

Broker __________________________________________________________

Address ____________________________ Phone _________________________

Company Name __________________________________ Common Preferred Bond Debenture

Date Bought ______________________ Certificate # ____________________

Unit Price $ _______________ # Shares ______________ Amount $________

Location of Certificate _____________________________________________

Broker __________________________________________________________

Address ____________________________ Phone _________________________

Company Name __________________________________ Common Preferred Bond Debenture

Date Bought ______________________ Certificate # ____________________

Unit Price $ _______________ # Shares ______________ Amount $________

Location of Certificate _____________________________________________

Broker __________________________________________________________

Address ____________________________ Phone _________________________
## Certificates of Deposit

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<th>Issuing Institution</th>
<th>Certificate #</th>
<th>Maturity Date</th>
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## Personal Debtors and Creditors

The following owe money to me:

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Exclusive of secured loans, such as mortgages, I owe to the following:

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Copies of notes, loan agreements and receipts are located at:

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Existing Trust Funds

Establishing a trust fund is one way to provide for the care of dependents. Living Trusts are established during life. Testamentary trusts are those established by will, after death.

Living Trust Beneficiary

Date of Establishment ________________________________

Agreement located at ________________________________

Trustees ____________________________________________

____________________________________________________

____________________________________________________

Attorney ____________________________________________

Date of Establishment ________________________________

Agreement located at ________________________________

Trustees ____________________________________________

____________________________________________________

____________________________________________________

Attorney ____________________________________________

Savings Bonds

<table>
<thead>
<tr>
<th>Date</th>
<th>Series #</th>
<th>Cost</th>
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Value __________________________ Date __________________________

Location of Savings Bonds __________________________

The beneficiaries of all insurance policies should be kept current at all times. Often, life insurance policies derived from membership in organizations such as the American Legion, VFW, automobile and travel clubs, and fraternal societies are overlooked by beneficiaries.

I belong to the following organizations which provide such benefits:

__________________________________________________
__________________________________________________
__________________________________________________
Insurance  
(Auto, Life, Accident, Disability)

Insurance is an important source of immediate cash for the family. Policies and premium receipts should be preserved in a safe place. A record of policy numbers, insurance companies, beneficiaries, etc. should be given to your executor, with a copy placed in the safe deposit box.

Company _________________________________________________________
Address _________________________________________________________
Policy # ________________ Type ______________ Date of Policy _________
Face Value__________________________
Beneficiary(s) _________________________
Location of Policy _______________________
Agent/Address/Phone ______________________________________________

Loans Against Policy _______________________________________________

Company Name ____________________________________________________
Address _________________________________________________________
Date Bought ______________________Certificate No. __________________
# Shares ________________ Price $ ______________ Amount $ __________
Location of Certificate ______________________________________________
Custodian Bank ___________________________________________________
Address _________________________________________________________
Date Sold _________________________________________________________
# Shares ________________ Price $ ______________ Amount $ __________

Company Name ____________________________________________________
Address _________________________________________________________
Date Bought ______________________Certificate No. __________________
# Shares ________________ Price $ ______________ Amount $ __________
Location of Certificate ______________________________________________
Custodian Bank ___________________________________________________
Address _________________________________________________________
Date Sold _________________________________________________________
# Shares ________________ Price $ ______________ Amount $ __________
Business Information

Name of Firm_____________________________________________________

Address _________________________________________________________

Principals ________________________________________________________

Association_______________________________________________________

Owner/Partner/Employee ___________________________________________

Position _________________________________________________________

Length of Service: From _____________________ to ____________________

Income__________________________________________________________

Position Benefits _________________________________________________

Insurance Benefits ________________________________________________

Social Security __________________________________________________

Other Benefits ____________________________________________________

Additional information available from: _________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________

Employment Benefit Arrangements

Employer________________________________________________________

Address _________________________________________________________

Telephone _______________________________________________________

Date of Employment ______________________________________________

Date of Retirement/Termination______________________________________

Social Security #___________________________________________________

Employee Benefits _________________________________________________

Retirement Plans___________________________________________________

Health Coverage __________________________________________________

Health Plan #_____________________________________________________

Name of Company Benefits Specialist _______________________________

Address _________________________________________________________

________________________________________________________________

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Telephone _______________________________________________________


### Business Information

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<td>Owner/Partner/Employee</td>
<td>Date of Retirement/Termination</td>
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<tr>
<td>Position</td>
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<td>Employee Benefits</td>
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<td>To</td>
<td>Retirement Plans</td>
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Loans Against Policy

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<tr>
<td>Date Bought</td>
<td>Certificate No.</td>
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<tr>
<td># Shares</td>
<td>Price $</td>
</tr>
<tr>
<td>Location of Certificate</td>
<td></td>
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<tr>
<td>Custodian Bank</td>
<td></td>
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<tr>
<td>Address</td>
<td>____________________________________________</td>
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<tr>
<td>Date Sold</td>
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<tr>
<td># Shares</td>
<td>Price $</td>
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<td>Address</td>
<td>____________________________________________</td>
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<tr>
<td>Date Sold</td>
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<tr>
<td># Shares</td>
<td>Price $</td>
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</tbody>
</table>
Mutual Funds

Company Name ____________________________________________________
Address ___________________________________________________________
Date Bought ______________________ Certificate No. ____________________
# Shares ________________ Price $ ______________ Amount $ ___________
Location of Certificate ______________________________________________
Custodian Bank _____________________________________________________
Address ___________________________________________________________
Date Sold __________________________________________________________
# Shares ________________ Price $ ______________ Amount $ ___________

Company Name ____________________________________________________
Address ___________________________________________________________
Date Bought ______________________ Certificate No. ____________________
# Shares ________________ Price $ ______________ Amount $ ___________
Location of Certificate ______________________________________________
Custodian Bank _____________________________________________________
Address ___________________________________________________________
Date Sold __________________________________________________________
# Shares ________________ Price $ ______________ Amount $ ___________

Company
Address ___________________________________________________________
Policy # ________________ Type ______________ Date of Policy __________
Face Value_________________________________________________________
Beneficiary(s) _____________________________________________________
Location of Policy _________________________________________________
Agent/Address/Phone _______________________________________________
Loans Against Policy _______________________________________________

The beneficiaries of all insurance policies should be kept current at all times. Often, life insurance policies derived from membership in organizations such as the American Legion, VFW, automobile and travel clubs, and fraternal societies are overlooked by beneficiaries.

I belong to the following organizations which provide such benefits:
_____________________________________________________________
_____________________________________________________________
_____________________________________________________________
**Existing Trust Funds**

Establishing a trust fund is one way to provide for the care of dependents. Living Trusts are established during life. Testamentary trusts are those established by will, after death.

**Living Trust Beneficiary**

Date of Establishment _____________________________________________

Agreement located at _____________________________________________

Trustees _______________________________________________________

_______________________________________________________________

_______________________________________________________________

Attorney ______________________________________________________

Date of Establishment _____________________________________________

Agreement located at _____________________________________________

Trustees _______________________________________________________

_______________________________________________________________

_______________________________________________________________

Attorney ______________________________________________________

**Savings Bonds**

<table>
<thead>
<tr>
<th>Date</th>
<th>Series #</th>
<th>Cost Maturity</th>
<th>Maturity</th>
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<td>Value</td>
<td>Date</td>
<td>Location of Savings Bonds</td>
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Certificates of Deposit

<table>
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<tr>
<th>Issuing Institution</th>
<th>Certificate #</th>
<th>Maturity Date</th>
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Personal Debtors and Creditors

The following owe money to me:

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Exclusive of secured loans, such as mortgages, I owe to the following:

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Copies of notes, loan agreements and receipts are located at:

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</table>
Real Estate

Description

Location of Property

Purchase Price ______________________ Date __________________

Deed Amount __________________ Location of Deed __________________

Amount of Mortgage __________________________

Type _________________________________

Mortgage Payments $ __________________________

Name of Mortgagor __________________________

Address __________________________________

Property Leased to __________________________

Address __________________________________

Property Leased to __________________________

Address __________________________________

Gross Income $ __________________________

Insurance on Property __________________________

Company Name __________________________

Common Preferred Bond Debenture

Date Bought ______________________ Certificate # __________________

Unit Price $ ___________________ # Shares ____________ Amount $__________

Location of Certificate __________________________

Broker ______________________________________

Address __________________________ Phone __________________

Company Name __________________________

Common Preferred Bond Debenture

Date Bought ______________________ Certificate # __________________

Unit Price $ ___________________ # Shares ____________ Amount $__________

Location of Certificate __________________________

Broker ______________________________________

Address __________________________ Phone __________________

Company Name __________________________

Common Preferred Bond Debenture

Date Bought ______________________ Certificate # __________________

Unit Price $ ___________________ # Shares ____________ Amount $__________

Location of Certificate __________________________

Broker ______________________________________

Address __________________________ Phone __________________
Securities

Valuable rights are often lost because the owners of stock certificates and bonds cannot be located. Records of Purchase and Sale, etc., are needed for tax purposes.

Company Name _____________________________________________
Common    Preferred    Bond    Debenture
Date Bought __________________________ Certificate # ________________
Unit Price $ _______________ # Shares ____________ Amount $__________
Location of Certificate _____________________________________________
Broker __________________________________________________________
Address _____________________________________ Phone _____________

Company Name _____________________________________________
Common    Preferred    Bond    Debenture
Date Bought __________________________ Certificate # ________________
Unit Price $ _______________ # Shares ____________ Amount $__________
Location of Certificate _____________________________________________
Broker __________________________________________________________
Address _____________________________________ Phone _____________

Company Name _____________________________________________
Common    Preferred    Bond    Debenture
Date Bought __________________________ Certificate # ________________
Unit Price $ _______________ # Shares ____________ Amount $__________
Location of Certificate _____________________________________________
Broker __________________________________________________________
Address _____________________________________ Phone _____________

Description
Location of Property ______________________________________________
Purchase Price _______________________ Date________________________
Deed Amount _______________________ Location of Deed________________
Amount of Mortgage ______________________________________________
Type __________________________________________________________________
Mortgage Payments $ __________________________________________________________________
Name of Mortgagor _________________________________________________
Address __________________________________________________________
Property Leased to _________________________________________________
Address __________________________________________________________
Property Leased to _________________________________________________
Address __________________________________________________________
Gross Income $ ___________________________________________________
Insurance on Property ______________________________________________

Thousands of dollars are lost each year in unclaimed bank accounts by unknowing families who did not have knowledge of the accounts.

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<thead>
<tr>
<th>Date</th>
<th>Description</th>
<th>Cost</th>
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**Bank/Credit Union/Savings & Loan**

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Safe Deposit Box

A safe deposit box is an inexpensive form of protection for important papers and records against fire and theft. Certain items cannot be replaced once lost or destroyed.

Bank

Address _____________________________

Box No. _____________________________ Key No. _____________

Those having access to box __________________________________________

Location of key ______________________________________________________

Contents of box as of: _____________________________ (date)

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

Bank

Address _____________________________

Box No. _____________________________ Key No. _____________

Those having access to box __________________________________________

Location of key ______________________________________________________

Contents of box as of: _____________________________ (date)

_______________________________________________________________

_______________________________________________________________

_______________________________________________________________

Professional Advisors

Attorney _____________________________

Address ___________________________________________

Phone ___________________________________________

Trustee _____________________________

Address ___________________________________________

Phone ___________________________________________

Executor(s) _____________________________

Address ___________________________________________

Phone ___________________________________________

Burial Information

Cemetery Plot owned at _____________________________

Deed located at ___________________________________________

I have given information regarding my funeral

☐ Will ☐ Letter ☐ Other

Tax Returns

Copies of tax returns are often needed in preparing returns for settling an estate.

Copies of income tax returns are located _____________________________

Current tax information located _____________________________
Individual Retirement Accounts (IRA's)

Company/Bank Name _________________________________________________________
Address ################################################################################
Date Bought ______________________ Certificate # ___________________ 
# Shares_______________ Price $ _____________ Amount $ _____________
Location of Certificate ______________________________________________
Custodian Bank___________________________________________________
Address _________________________________________________________

Company/Bank Name _________________________________________________________
Address ################################################################################
Date Bought ______________________ Certificate # ___________________ 
# Shares_______________ Price $ _____________ Amount $ _____________
Location of Certificate ______________________________________________
Custodian Bank___________________________________________________
Address _________________________________________________________

Company/Bank Name _________________________________________________________
Address ################################################################################
Date Bought ______________________ Certificate # ___________________ 
# Shares_______________ Price $ _____________ Amount $ _____________
Location of Certificate ______________________________________________
Custodian Bank___________________________________________________
Address _________________________________________________________

Military Service

Branch of Service _________________________________________________________
Dates of Service From____________________ To____________________
Service No. _____________________________________________________
Discharge Papers Located at: _________________________________________
G.I. Insurance Policy No.____________________________________________
VA Claim No. ____________________________

Federal Benefits for orphans and widows of veterans are as follows:
- Burial in national cemeteries
- Burial flag for veterans (obtain at Post Office)
- Burial expense reimbursement
- Compensation for widows and orphans if death was not service connected
- Pension for widows and minor children if death was not service connected
- Parent’s compensation
- Children’s Education – for children of veterans whose death was service con-
  nected or who are 100% disabled
- Home loans for widows-unremarried widows of veterans who die of service
  connected causes are eligible for G.I. Home Loan
- Headstone or Gravemaker

For information, contact the Regional Veterans’ Administration offices in
Philadelphia and Pittsburgh or V.A. contact offices located throughout the state in
larger communities. Veterans’ organization service officers and county directors
of veterans offices are also qualified to provide benefit information and service.

State Benefits for widows and orphans are as follows:
- Emergency financial aid for needy widows
- Scholarship assistance for children of veterans whose death was service con-
  nected or who are 100% disabled
- Real estate tax exemption for needy unremarried widows of veterans who
  were 100% disabled

For information or assistance in applying for State benefits, contact the local
County Director of Veterans’ Affairs.
Personal Data

Date of Birth _____________________________________________________

Place of Birth _____________________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________

Location of Birth Certificate__________________________________________

Naturalization Papers ______________________________________________

Location of Marriage Certificate ___________________ Date __________

Location of Divorce Papers ________________________ Date __________

Social Security Number _____________________________________________

Name of Spouse___________________________________________________

Address _________________________________________________________

Names of Children/Addresses ________________________________________
________________________________________________________________
________________________________________________________________
________________________________________________________________

Name of Father ___________________________________________________

Date of Birth ______________________________ Date of Death___________

Name of Mother (Maiden) __________________________________________

Date of Birth ______________________________ Date of Death___________

Names of Brothers/Sisters ___________________________________________
________________________________________________________________
________________________________________________________________

Company/Bank Name ______________________________________________

Address _________________________________________________________

Date Bought ______________________ Certificate # ___________________

# Shares ______________ Price $ __________ Amount $ _____________

Location of Certificate ____________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________

Company/Bank Name ______________________________________________

Address _________________________________________________________

Date Bought ______________________ Certificate # ___________________

# Shares ______________ Price $ __________ Amount $ _____________

Location of Certificate ____________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________

Company/Bank Name ______________________________________________

Address _________________________________________________________

Date Bought ______________________ Certificate # ___________________

# Shares ______________ Price $ __________ Amount $ _____________

Location of Certificate ____________________________________________

Custodian Bank___________________________________________________

Address _________________________________________________________
Other Personal Property

I own the following types of personal property:

- [ ] Automobile
- [ ] Machinery
- [ ] Boat
- [ ] Sports Equipment
- [ ] Hobby Equipment
- [ ] Tools
- [ ] Heirlooms/Antiques
- [ ] Valuable Collections (Art, books, coins, gems, minerals, stamps, etc.)
- [ ] Household Furnishings
- [ ] Jewelry
- [ ] Clothing
- [ ] Recreational Vehicles
- [ ] Other (list) _________________________________________________

_______________________________________________________________
_______________________________________________________________
_______________________________________________________________
_______________________________________________________________

An itemized inventory of this property, including item name, description, location and name of joint owner (if any) can be found at:

_______________________________________________________________

Importance of Last Will and Testament

The information you enter in this book will be of value to family and personal representatives in the event of your death. It will not, however, determine the disposition of your property. Only your Last Will and Testament can do that. If you do not have a Will, you may wish to consult your attorney and arrange to prepare one.

I have a Will, which was prepared on ______________________________(date)
Located at _______________________________________________________
Executor(s) ______________________________________________________
Address/Telephone ________________________________________________

Living Will Information

Pennsylvania state law (Act 24 of 1992) now provides for implementation of a Living Will, which details the wishes of a person pertaining to the extent of life preserving efforts he or she wants extended in the event of terminal illness or complete incapacity. If you have made a decision on this matter, it is important that your wishes be put in writing. Because of the complexities of this issue, it is wise to consult an attorney on the matter of a Living Will.

I have a LIVING WILL, which was prepared on____________________(date)
Located at _______________________________________________________
Surrogate(s) _____________________________________________________
Address/Telephone ________________________________________________
### What to Keep in Your Safe Deposit Box or Other Safe Place

#### What to keep permanently
- [ ] Birth Certificate
- [ ] Will
- [ ] Marriage Record
- [ ] Social Security Card
- [ ] Paid Mortgage or Loan Contracts
- [ ] Real Estate Deeds
- [ ] Records of jointly owned property
- [ ] Other real estate papers

#### What to keep for 7 years
- [ ] Savings pass book (after closed)
- [ ] Cancelled checks
- [ ] Check stubs
- [ ] Bank statements
- [ ] Receipted bills and sales slips
- [ ] Property investment records

#### For 10 years
- [ ] Income tax records

#### While in force
- [ ] U.S. Savings Bonds
- [ ] Warranties and instruction books

#### During ownership (plus 7 years)
- [ ] Stocks and bonds records

#### Other
- [ ] Insurance policies (consult agency)
By maintaining a comprehensive record of your personal affairs, you can keep important information available for easy access. In times of emergency, it is important that you, and your family, be able to take immediate action with regard to financial affairs.

Also, an inventory is invaluable when death occurs.

This booklet can be as comprehensive as you deem necessary. Advise family members of this record, and where it is kept. Once-a-year update is advised.

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