

One Man In Thousands Doesn't Need a Will

He meets one of two conditions:

1. He has no property to dispose of, of any kind, nor any prospect of acquiring any property. (No cash, no land, no home, no pension, no securities).

2. He has no affection or responsibilities for any other person (no wife, no children, no living relatives...not even a friend).

A man without resources or responsibilities, one who bears no one affection, needs no Will.

...but most of us have both resources (however limited) and obligations. The job is to stretch the one to take care of the other. Both resources and obligations have a way of extending beyond the lifetime of an individual. This calls for a Will. Drawing your Will is a job for your lawyer. Carrying out the terms of your Will to fulfill your obligation to your family, friends, church or school is the business of your Executor. If you are NOT the one man in thousands who doesn't need a Will, come in and talk with one of our attorneys.

Record of Personal Affairs

(first) (middle) (last name)

Address

I. Personal Record

1. Place and date of birth:

2. Naturalization (if applicable)

(Date & Designation & location of Court)

3. Parents names:

Father: _____

Date/Place of Birth: _____

Mother: _____

Date & Place of Birth: _____

4. Your marriage:

To Whom: _____

Place & Date: _____

5. Previous marriage to: _____

at: _____ date: _____

ended date: _____ place: _____

Death or Divorce: _____

6. Children (names, date, place of birth, addresses)

7. Name & address of lawyer or friend who may be consulted in regard to my personal business affairs

II. Family Records Location

1. Birth certificates or other proof of date of birth of self & of each member of immediate family (required by insurance companies & Social Security)

2. Naturalization papers

3. Marriage certificate (necessary in order to establish claims for certain payments and benefits & in connection with the Will, also Social Security and VA benefits)

4. Divorce decree, death certificate or certified copies of same (in case of either spouse)

III. Other Important Papers

1. Will:

I have__ have not__ executed Will

Will located _____

Lawyer's name & address _____

Executor's name & address _____

2. Power of Attorney:

I have__ have not__ executed a power of attorney dated _____

naming _____

attorney in fact.

3. Income tax:

Copies of my Federal Income Tax returns & related papers located at: _____

WHAT I OWN AND WHERE

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& ASSOCIATES
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Brook 35 Plaza

Sea Girt, NJ 08750

(732) 359-0221

Copies of State intangible tax returns & related papers are located at _____

Other taxes:
Real estate & intangible tax receipts are located at _____

IV. Insurance
I have the following types of life insurance:
Gov't. _____ Com'l. _____ Both _____

Ins. Company _____
Policy # _____
Amount _____
Payment option _____
Ins. Company _____
Policy # _____
Amount _____
Payment Option _____
Ins. Company _____
Policy # _____
Amount _____
Payment Option _____
Policies located _____

Premium receipts located _____

Insurance coverage by professional, fraternal or trade association:

(Add in manner similar to above pertinent information regarding property, accident, liability or other insurance protection you may have) _____

V. Annuities

Annuities payable as follows:
Government _____
Commercial _____
Both _____

Other annuity _____
(name of organization)

Payable to _____
Address _____
Papers located _____

VI. Social Security Data:

1. Social Security# _____
2. Location of Social Security card or stub _____
3. Social Security tax payments have been made *(list years)* _____

4. Location of up-to-date employment record, including place & type of work in each case:

VII. Property Ownership or Interest Therein

1. Real estate located at _____

A. The property is encumbered by a _____
(mtg., trust, deed, etc.)

held by _____
B. Taxes on the property are paid to & including the year _____
Property insured with _____
Policy # _____
Insured against _____
(fire, damage, liability, etc.)

Amt. of Ins. \$ _____
Deed, insurance, etc. are located at _____

(Make as many other entries as may be required to complete record as to each piece of real estate in which you have an interest on another sheet of paper and attach).

2. Automobile record:

A. _____
(Make, model & year)
B. _____
(Title number, date and State)
C. Automobile insured with _____
(Insurance company & policy number)
D. Automobile papers located at: _____

3. Personal property:
(In manner similar to above, add any information concerning other large items of personal property owned, such as a boat, machinery, livestock, goods in storage, etc. on another sheet of paper and attach).

VIII. Bank Accounts

1. Type of account _____
located in _____
(name & location of bank)

2. *(Add as many similar entries as may be required to show all bank accounts)*

IX. Safe Deposit Box

1. Name of bank or trust company _____
Address _____
Location of key _____

X. United States War or Savings Bonds

(where located)
1. Personal designated as _____
(co-owner)
(beneficiary)

2. List bonds by serial numbers, denomination and location: _____

(This is necessary to replace lost bonds)

XI. Stocks and Bonds and Securities owned and where located:

XII. Cemetery Plot:

Survivors need information concerning this in order to carry out your wishes. I own a plot in the following cemetery _____

Address _____
The deed to the plot is located at _____

There is _____ is not _____ a provision for perpetual care of this plot. I have given instructions regarding my funeral in my Will _____ A letter _____ Other _____

XIII. Memorandum:

Enter any additional data desired regarding your affairs and instructions to dependents, Veterans Administration claim number, etc., not previously covered on another sheet and attach.

DATED: _____

SIGNATURE: _____