

LEAVE A LEGACY® WESTERN NEW YORK ESTATE INVENTORY

(This is a checklist which was developed by an attorney which should prove helpful when you meet with your attorney to draw up or update your will.)

FAMILY

- Name _____
- Address _____
- Date of Birth _____
- Place of Birth _____
- Social Security Number _____
- Name of Spouse _____
- Names, addresses, telephone and social security numbers of children _____

- Names, addresses, telephone and social security numbers of siblings _____

- Type and number of medical insurance _____

FINANCIAL

- Checking Account info _____
- Savings Account info _____
- Certificates of Deposit _____
- Accounts Receivable (money owed to you) _____
- Stocks, Bonds and Mutual Funds _____
- Insurance Policies _____
- Annuity Contracts _____

PERSONAL PROPERTY

- Automobile (make, model, year, value, title location) _____

- Other Vehicles, recreational, etc. _____
- Special Household Furnishings _____
- Jewelry, Furs _____
- Other Valuables _____

BENEFITS (401K, IRA)

Name of Company _____

REAL ESTATE INTERESTS

Primary Residence _____

BUSINESS INTERESTS

GENERAL INFORMATION

- Safety Deposit Box

Owner

Location of Box

Location of Keys

- Attorney _____

- Accountant _____

- Church, Synagogue or Spiritual Advisor _____

- Funeral Arrangements _____

- Cemetery Preference _____

- Insurance Broker _____

- Financial Broker _____

- Name of Executor _____

My wishes with regard to my family:

My wishes for my favorite charities: (include name of charity, contact name, telephone number and address with a description of your bequest.)

discovery