

LAW OFFICE OF JAMES E. MISCAVAGE

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Attorney
James E. Miscavage

PERSONAL ESTATE INVENTORY AND PLANNER

A personal record of assets and obligations for _____.

ITEMS TO KEEP IN YOUR SAFE DEPOSIT BOX OR OTHER SAFE PLACE

Birth certificates
Death certificates
Marriage record
Social Security card
Deeds
Purchase records of real estate and improvement expenses
Mortgages
Appraisals of valuable personal property
List of passwords for computers/phones/ online accounts
Insurance policies
Savings bonds
Divorce decrees
Recent copy of statements for all bank and brokerage accounts

LAST WILL AND TESTAMENT

It is our practice to hold the original Will. Your copy will be stamped "The original of this document is being held for safekeeping in the safe deposit box of Attorney James E. Miscavage." If the original Will is in your possession and cannot be found, the presumption is you destroyed it. If you have a copy, as stamped, and you cannot find the attorney, your executor can probate your copy of the Will. The presumption can be overcome. We recommend you allow the attorney to hold your original Will.

POWER OF ATTORNEY

It is our practice to have the attorney hold the original Power of Attorney. If or when it is needed, the attorney should be contacted at that time by you or your agent and the Power of Attorney will be turned over to your agent at that time. You will be notified of the release of the Power of Attorney by phone or mail.

ADVANCE DIRECTIVE

It is our practice to give the original living will to you for emergency purposes.

PERSONAL DATA

Date of birth

Place of birth

Location of birth certificate

Location of marriage certificate

Location of divorce papers

Social Security number

Name of spouse and children

Addresses and phone numbers of children

Name of your mother and father

Date of death of your mother and/or father

Name of your brothers and sisters

Contact information for them

MILITARY SERVICE INFORMATION

Branch served

Discharge papers located at

G.I. insurance policy

VA claim number

<https://benefits.va.gov/BENEFITS/factsheets.asp>

See the above website for a direct link to summaries of VA benefits

BANK ACCOUNTS

List name of bank and account number. The ID number and entry password should be provided for each account. Also, provide password hints and tips that are required as a backup. For example, 1st girlfriend/1st boyfriend/ favorite pet etc.

STOCKS AND BONDS

List of original certificates you have in your possession. We recommend all stock and bond certificates are put in a brokerage account.

List of name of brokerage company and account number. The ID and password should be provided for each account.

BUSINESS INFORMATION

You should provide enough information so someone can come into the office and at a minimum be able to prepare your final tax return from the information you have left and made available. All insurance policies such as Worker's Compensation, office liability, and term or whole life. Also, leases; pending contracts and other matters should be readily available at your office.

EMPLOYMENT BENEFITS FROM YOUR EMPLOYER

List all 401(k), 403(b), SEP-IRA and other tax-deferred plans you are entitled to and earned from all employment. A copy of the statements should be in a safe place. A summary could be provided of the account numbers and passwords to enable someone to enter the account and obtain information if necessary.

Any insurance benefits provided by the employer should be provided and/or explained.

PERSONAL INSURANCE

The company and policy numbers for home, auto, life, accident and disability should all be provided.

EXISTING TRUST

If a living trust was established during your lifetime, the trust document should be kept with your Will. It should be made available. It should be reviewed periodically with your lawyer.

PERSONAL DEBTORS OR CREDITORS

If anyone owes you money, it should be explained and the appropriate paperwork for proof of same and for payback should be available. Without a good record, your survivors might not be able to determine what amount of money is owed or what was paid.

LIST OF YOUR DEBTS

BURIAL INFORMATION

Location of cemetery plot, deed of plot, information on handling of my funeral is located at

Cremation? _____ Yes _____ No

TAX RETURNS

You should keep the last three years tax returns with all attachments in your personal possession.

INDIVIDUAL RETIREMENT ACCOUNTS

Name of company, account number, passcode, and phone number for your advisor.

COLLECTIBLES OR ANTIQUES OF VALUE

If you have items you think have significant value you should provide appraisals, purchase papers or a history and/or summary of these items with photographs. They should be insured under your insurance policy for loss or theft.