

# The Personal Record of

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## **Steven Schragger Probate Real Estate Expert**

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For information about our services please  
visit: <https://www.cnjprobate.com>.

If our office can be of any help to you, if you have a question, or if you wish to arrange a date to have Steven Schragger speak to your club or organization, contact our office at 732-651-8400.

## MY LEGAL RESIDENCE

Street \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_

This information is vital because the laws of the state effect many areas - the division of your estate, your marriage, your divorce, and the care and custody of your children.

## PERSONAL INFORMATION

I was born in \_\_\_\_\_

Date \_\_\_\_\_

I have a birth certificate [ ] yes [ ] no

It is kept in \_\_\_\_\_

My Social Security Number is \_\_\_\_\_

I was married in \_\_\_\_\_

Date \_\_\_\_\_

My marriage certificate is located in \_\_\_\_\_

I have been divorced \_\_\_\_\_

Date \_\_\_\_\_ Where \_\_\_\_\_

Divorce papers are kept at \_\_\_\_\_

I served in the Armed Forces \_\_\_\_\_

Dates of Service \_\_\_\_\_

Serial Number \_\_\_\_\_

Discharge papers are kept at \_\_\_\_\_

## MY LAST WILL AND TESTAMENT

I  have  have not made a will

It is dated \_\_\_\_\_ It is kept at \_\_\_\_\_

It was drawn by my attorney: \_\_\_\_\_

My will appoints \_\_\_\_\_

\_\_\_\_\_ as executor(s) and trustee(s)

\_\_\_\_\_ as guardian(s) of my children

**NOTE: If you have not made a will, it is advisable that you do so. Without a will specifying your wishes, your estate will be distributed in accordance with the laws of your State and the court will appoint any administrators and/or guardians that may be necessary.**

***This may cause family trouble and unnecessary loss of property which could easily be avoided with a properly drawn will.***

## MY SAFE DEPOSIT BOX

I  do  do not have a safe deposit box

It is located at \_\_\_\_\_

It can be opened by \_\_\_\_\_  
(name)

\_\_\_\_\_  
(address)

## MY RESIDENCE

I  do  do not own my residence

Title is  in my name only

in joint name with \_\_\_\_\_

There is   is not a mortgage on this property

Mortgage is held by \_\_\_\_\_

I rent and my landlord is: \_\_\_\_\_

My security deposit is: \_\_\_\_\_

I own the following other real estate: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

The following papers are kept at \_\_\_\_\_

Copy of Mortgage(s) \_\_\_\_ Closing Statement(s) \_\_\_\_  
Deed(s) \_\_\_\_ Surveys \_\_\_\_  
Title Abstract \_\_\_\_ Insurance Policies \_\_\_\_  
Title Insurance \_\_\_\_ Tax Receipts \_\_\_\_  
Lease(s) \_\_\_\_

My Insurance broker is: \_\_\_\_\_

## I HAVE CHECKING & SAVINGS ACCOUNTS

My checking accounts are with the following banks:

\_\_\_\_\_

The following person has the power to sign checks on these accounts:

\_\_\_\_\_

(name)

\_\_\_\_\_

(address)

My savings accounts are with the following banks:

\_\_\_\_\_

The accounts are [ ] in my name only  
[ ] jointly with: \_\_\_\_\_

My checks and savings books are kept at \_\_\_\_\_

## I OWN STOCKS & BONDS

Kept at \_\_\_\_\_

Records of their purchase and sale will be found at

\_\_\_\_\_  
Some of these securities were given to me or inherited

yes

no

Papers are located at \_\_\_\_\_

I  have  have not pledged some or all of my securities for loans with \_\_\_\_\_

*(name)*

\_\_\_\_\_  
*(address)*

## I OWN U.S. SAVINGS BONDS

In  my name only  jointly with \_\_\_\_\_

I am beneficiary at death of \_\_\_\_\_

At my death, beneficiary is \_\_\_\_\_

The bonds are kept at \_\_\_\_\_

A record of the bonds and their serial numbers will be found at \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

# MY PERSONAL PROPERTY

Includes household furnishings located at \_\_\_\_\_

Jewelry kept at \_\_\_\_\_

Furs kept at \_\_\_\_\_

Other \_\_\_\_\_

Location \_\_\_\_\_

It is owned [ ] by me alone [ ] jointly with

\_\_\_\_\_  
(name)

\_\_\_\_\_  
(address)

My personal property [ ] is [ ] is not insured

My insurance broker is \_\_\_\_\_  
(name)

\_\_\_\_\_  
(address)

Bills of sale, insurance policies and personal property  
tax receipts are kept at \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_



# MY LIFE INSURANCE

I  do  do not carry life insurance

Policies are kept at \_\_\_\_\_

Others  do  do not carry insurance on my life

Names and addresses of owners: \_\_\_\_\_

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An itemized list of all insurance policies carried on my life is kept at \_\_\_\_\_

I  do  do not carry life insurance on others

Names and addresses of those insured: \_\_\_\_\_

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Policies are kept at \_\_\_\_\_

An itemized list of such policies is kept at \_\_\_\_\_

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I  have  have not made loans against some of these life insurance policies.

These loans have been made with:

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(name)

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(address)

I have filed the following papers with the policies:

Premium Receipts     Settlement Agreements  
 Dividend Statements    Assignments

## OTHER DEATH RELATED BENEFITS

I am employed by \_\_\_\_\_

I have been employed there for \_\_\_\_\_ years.

As a condition of my employment I am entitled to the following death related benefits:

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I am a member of the following fraternal organizations:

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The organization can be contacted at: \_\_\_\_\_  
\_\_\_\_\_

As a result of my membership I am entitled to the following death related benefits: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

I am a veteran of the United States Armed Forces. I am entitled to the following death related benefits:  
\_\_\_\_\_  
\_\_\_\_\_

I have mortgage Insurance with: \_\_\_\_\_  
This insurance policy can be located at \_\_\_\_\_  
\_\_\_\_\_

This policy provides that my mortgage will be paid in full upon my death.

## MY TAX RETURNS

Copies of my income tax returns are kept at \_\_\_\_\_  
\_\_\_\_\_

All necessary papers [ ] are [ ] are not attached to the returns.

Withholding tax receipts or forms received from my employer are kept at \_\_\_\_\_  
\_\_\_\_\_

## MY FAMILY

My father is \_\_\_\_\_  
(name)

\_\_\_\_\_  
(address)

Place of birth \_\_\_\_\_

My mother is \_\_\_\_\_  
(name)

\_\_\_\_\_  
(address)

Her birth name was \_\_\_\_\_

Place of birth \_\_\_\_\_

## MY TRUST FUNDS

I have established a trust fund for: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Date established: \_\_\_\_\_

Trustee appointed: \_\_\_\_\_

Drawn by: \_\_\_\_\_  
*(name of attorney)*

\_\_\_\_\_  
*(address)*

I am a beneficiary under a trust established by:

\_\_\_\_\_

Papers are kept at \_\_\_\_\_

If I die, my heirs are beneficiaries of trust funds established by: \_\_\_\_\_

Papers are kept at \_\_\_\_\_

**PLEASE NOTIFY**

My family: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**The Following:**

Attorney \_\_\_\_\_ Phone# \_\_\_\_\_

Accountant \_\_\_\_\_ Phone# \_\_\_\_\_

Banker \_\_\_\_\_ Phone# \_\_\_\_\_

Broker \_\_\_\_\_ Phone# \_\_\_\_\_

Clergyman/  
Rabbi \_\_\_\_\_ Phone# \_\_\_\_\_

Doctor \_\_\_\_\_ Phone# \_\_\_\_\_

Employer \_\_\_\_\_ Phone# \_\_\_\_\_

Executor  
of Estate \_\_\_\_\_ Phone# \_\_\_\_\_

Insurance  
Broker \_\_\_\_\_ Phone# \_\_\_\_\_

**MY PERSONAL DEBTS & LOANS  
OUTSTANDING**

The following people owe me money: \_\_\_\_\_

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I owe money to the following in addition to my mortgage and other secured loans: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Copies of loan arrangements, notes and receipts are kept at: \_\_\_\_\_

*Debt Insurance.* I have the following additional debt insurance: \_\_\_\_\_

\_\_\_\_\_

These policies can be located at: \_\_\_\_\_

\_\_\_\_\_

These policies provide that upon my death the following debts will be paid: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

*Prepaid Funeral.* I have a prepaid funeral registered with the following funeral director:

\_\_\_\_\_

Funeral Instructions: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## MY CEMETERY PLOT

I  do  do not own a cemetery plot

It is located in the \_\_\_\_\_  
(name of cemetery)

\_\_\_\_\_  
(address)

Deed to the plot is kept at \_\_\_\_\_

I  have  have not arranged for perpetual care

Instructions for my funeral will be found at \_\_\_\_\_

## A WORD ABOUT TAXES

*One of the most difficult duties one will face when acting as either an Executor or an Administrator of an estate is the payment of the taxes on the estate.*

*If the Decedent owned assets individually or jointly an inheritance tax form may be required to be filed with the Inheritance Tax Bureau. For information contact 609-292-5033.*

*These forms are available at the Inheritance Tax Bureau, CN 249 Trenton, New Jersey 08646.*









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