

Western New York Leave a Legacy 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 _____
- Name, addresses, telephone and SS #s of children _____
- Name, addresses, telephone and SS# 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 and 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 and telephone number and address and a description of your bequest).

