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MY PERSONAL RECORDS

Use this workbook to keep track of your personal records and information for your loved ones. Knowing this information will be helpful to your executor, agent and family if you die or become incapacitated. Keep these records in a safe place. Make sure an appropriate person knows where to look for them. Be sure to update these records from time to time.

The attorneys at Pattillo Richards, P.C., can assist you with your estate planning, probate and trust needs. Please give us a call if we can be of assistance.

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1. Information Regarding These Records

This information was entered in this workbook on the _____ day of _____, 20____, by _____.

It has been revised or reviewed as follows: (List Dates)

1. _____
2. _____

The original of these records is kept: (Give Location) _____
_____.

(If applicable) A copy of these records is kept: (Give Location) _____
_____.

Attorney: _____

Former Spouse: _____

First

Middle

Maiden Name

If marriage ended in death:

Date _____

Month

Day

Year

Cause of Death: _____

Cause

City

Age

If marriage ended in divorce:

Date _____

Month

Day

Year

Place of Divorce: _____

City

State

Records at: _____

Attorney: _____

Former Spouse: _____

First

Middle

Maiden Name

If marriage ended in death:

Date _____

Month

Day

Year

Cause of Death: _____

Cause

City

Age

If marriage ended in divorce:

Date _____

Month

Day

Year

Place of Divorce: _____

City

State

Records at: _____

Attorney: _____

Parents:

Father: _____
Date Place

Born: _____

Died: _____

Buried at: _____

Mother: _____
(Maiden Name)

Date Place

Born: _____

Died: _____

Buried at: _____

Military Service:

_____ No military service

Branch of Service: _____ Country _____

From: _____ To: _____

Date of Discharge: _____ Type of Discharge: _____

Highest Grade Or Rank Attained: _____

Employment:

My present employer is: _____
Name

Address Phone

Date Started: _____ Supervisor: _____

Social Security No.: _____

Card located at: _____

In addition, I am eligible under the following pension, profit sharing and other benefit plans:

1. _____
2. _____
3. _____
4. _____

I am _____ am not _____ a member of a Labor Union.

Name of Local: _____

Address	Phone
---------	-------

I am _____ am not _____ a member of a Credit Union.

Name	Address
------	---------

3. My Estate Planning Documents

My Will: _____ I have no Will.

Original executed copy of my will is located at

It is dated _____, _____

The original executed Codicil (revision), if any, is located at:

It is dated _____, _____

Attorney who drew my will is: _____

Name	Address	Phone
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Names of Executor(s) and Trustee(s):

Names of Guardians of my Children:

Witnesses to Will: (List Names and Addresses)

My Directive to Physicians and Family or Surrogates (“Living Will”):

I have a “Living Will” _____ I have no “Living Will” _____

It is located at _____
and is dated _____

My Medical Power of Attorney:

I have a Durable Power of Attorney for Property _____ I have no such power _____

It is located at _____
and is dated _____

My Durable Power of Attorney for Property:

I have a Durable Power of Attorney for Property _____ I have no such power _____

It is located at _____
and is dated _____

The attorney who drew this document is _____

My Declaration of Guardian:

I have a declaration of whom I want to be my guardian should the need later arise _____

I have no declaration of guardian _____

It is located at _____
and is dated _____

My Trusts:

I have created (or am a beneficiary of) the following trusts:

Trust Name: _____
Date of Trust Instrument: _____
Original Trust Instrument is Located At: _____
Name and Address of Current Trustee: _____
Name and Address of Successor Trustee(s): _____

Trust Name: _____
Date of Trust Instrument: _____
Original Trust Instrument is Located At: _____
Name and Address of Current Trustee: _____
Name and Address of Successor Trustee(s): _____

Trust Name: _____
Date of Trust Instrument: _____
Original Trust Instrument is Located At: _____
Name and Address of Current Trustee: _____
Name and Address of Successor Trustee(s): _____

Other Estate Planning Documents: (Please describe and state location)

4. Insurance

Life Insurance:

I do _____ do not _____ have Life Insurance.

Complete itemized list can be found.

Policies are located at: _____

Policies Covering Others:

I own insurance policies on the lives of others. A list of companies and policy numbers is located at: _____

Name of persons insured: _____

I have _____ have not _____ made loans against some of the policies.

Source of Loan: _____

Address

Phone

Pertinent papers are filed with the policies: (Check)

Endorsements Dividend Payments
 Premium Receipts Assignments
 Settlement Agreements

Annuities:

I do _____ do not _____ have annuities:

Detailed list is located at: _____

Location of annuity contracts: _____

My principal life insurance broker is:

Name

Address

Phone

Medical and Long Term Care Insurance:

Accident, Hospitalization, Disability, Long term care and all other insurance (in addition to and exclusive of those covered by employer) not noted elsewhere.

Location of List: _____

Location of Policies: _____

Broker/agent Phone

Medicare:

I am _____ am not _____ registered for Medicare.

Enrollment _____ at _____
Date City State

Medicare card located at: _____

5. My Assets and Liabilities

Safe Deposit Boxes:

I have _____ have not _____ a safe deposit box(es.)

Located at _____

Keys will be found at _____ No. _____

No. _____

The following person has access: (Name and Address)

No. _____

No. _____

Accounts:

Checking

Accounts: _____
With _____ Number _____

_____ With _____ Number _____

Savings

Accounts: _____
With _____ Number _____

_____ With _____ Number _____

Other

Accounts: _____
With _____ Number _____

_____ With _____ Number _____

_____ With _____ Number _____

_____ With _____ Number _____

Passbooks located at: _____

Accounts in joint names with myself and: (Name & Acct. No.)

Name of person who power to sign checks for me:

_____ Address _____ Phone _____

Real Estate:

I do _____ do not _____ own real estate. _____ I am the sole owner.

It is located at: _____

Mortgage on my Real Estate is held by:

The following documents are located at: _____

Check (X):

- | | |
|--|--|
| <input type="checkbox"/> Deed | <input type="checkbox"/> Mortgage Insurance Policy |
| <input type="checkbox"/> Copy of Mortgage | <input type="checkbox"/> Title Abstract |
| <input type="checkbox"/> Improvement Loans | <input type="checkbox"/> Closing Statement |
| <input type="checkbox"/> Title Insurance | <input type="checkbox"/> Leases |
| <input type="checkbox"/> Tax Receipts | <input type="checkbox"/> Maps & Surveys |

Other Real Estate I own: I am sole owner.

Documents pertaining thereto are located at:

Insurance Coverage is handled by:

Name of Broker	Address	Phone
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Policies are located at: _____

I lease property to others: Yes No

Vacant Improved

To: _____

Name

Address

Phone

At _____
List Location

Leases can be found at: _____

U. S. Savings Bonds:

I do _____ do not _____ own U.S. Savings Bonds.

_____ I am sole owner.

List of Bonds – Serial Numbers – Co-ownership – and who is a Beneficiary at my death
can be found at: _____

Bonds are located at: _____

Securities (Stocks and Bonds):

I do _____ do not _____ own securities (Stocks & Bonds).

List of all securities and certificate numbers will be found at:

Certificates located at: _____

I do _____ do not _____ have a brokerage account.

Name of Broker or Firm: _____

Name

Address

Phone

Records of Purchase and Sale are located at: _____

List Securities pledged for loans:

_____ with _____
Lender Address

_____ with _____
Lender Address

_____ with _____
Lender Address

Personal Property:

I own the following personal property:

Auto: Yes _____ No _____

1. _____
Make Year

2. _____
Make Year

Title(s) located at: _____

Household Furnishings: Yes _____ No _____

Located at: _____

Record of Inventory located at: _____

Jewelry: Yes _____ No _____ Inventory List & Appraisals
at: _____

Boat: Yes _____ No _____
_____ Make Year

Motor Year

Located at: _____

Miscellaneous Personal Property – (not previously listed):

Pertinent insurance policies on personal property are located at: _____

Insurance Broker: _____
Name Phone

Proof of Ownership, Receipts, Bills of Sales, etc., are located at: _____

Miscellaneous Assets:

List here other assets you own that are not otherwise covered above.

Credit Cards:

I possess the following credit cards:

Other Liabilities:

Mortgages, notes, and other debts not noted elsewhere.

Description: _____

Description: _____

Description: _____

Description: _____

Description: _____

Description: _____

Tax Records:

Copies of previous years tax returns filed are located at: _____

Party who prepared or assisted in tax returns: _____

Work sheets and evidence in support of returns are located at: _____

Current withholding tax forms and receipts received from my employer are located at:

6. Burial

(Please note: A special form is required to leave binding burial instructions. You can indicate your wishes here, but those indications are not binding on your family. Ask a lawyer at Pattillo Richards, P.C. for more information.

I do _____ do not _____ own a cemetery lot.

Cemetery Lot: _____
Name of Cemetery Describe location

Deed located at: _____

There is _____ is not _____ provision for perpetual care.

I have given instructions regarding my funeral in:

_____ Letter Other: _____

List membership in lodges or fraternal organizations providing cemetery benefits:

My preference for burial would be at:

Name of Cemetery City

Religious Affiliation:

List Church or Temple

Address

Pastor or Rabbi Phone

7. Persons Familiar with My Affairs

Please print name, address and phone number.

Attorney: _____

Accountant – Tax Counselors: _____

Banker: _____

Doctor: _____

Employer: _____

Funeral Director: _____

Insurance Agent: _____

Executor of Estate: _____

Fraternal or Professional Groups: (Please notify) _____

Relatives and Personal Friends: (Please notify) _____

8. Electronic Data

Emails

Email Addresses

Passwords

Websites

Login name

Passwords

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