



The Personal Record of

Name

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This booklet is prepared by the Middlesex County Surrogate’s Office and is available to all county residents.

For information about our office please visit:
<http://www.middlesexcountynj.gov/surrogate>.

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 the Surrogate speak to your club or organization, contact our office at 732-745-3055.

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: _____

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: _____

Policies are kept at _____

An itemized list of such policies is kept at _____

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

These loans have been made with:

(name)

(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:

I am a member of the following fraternal organizations:

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: _____

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.

ADDITIONAL INFORMATION

Middlesex County Board of County Commissioners

Ronald G. Rios, *Director*

Shanti Narra, *Deputy Director*

Claribel A. Azcona-Barber, Charles Kenny,

Leslie Koppel, Chanelle Scott McCullum,

Charles E. Tomaro



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