

MEMO FOR SURVIVING RELATIVES

New Mexican, July 10, 1959

Sylvia Porter

Shortly after my last birthday I finally got to the job of working out a personal who-what-where-when-how. I admit I was prodded into it by a banker friend but, as I wrote yesterday, it has been a most valuable experience, and I hope I can prod you into doing the same thing.

Pick a quiet, relaxed moment and approach your record-making in this mood. Get a small notebook and start thinking: What do you put into a personal record to help guide those who must settle your affairs?

Obviously, you list the names, addresses, dates of birth of yourself, your wife or husband, your children, father and mother.

Also obviously, you should write on separate lines and in clear detail such information as:

The location and date of your will, the name of the executor, and if a bank is the executor, the name of the bank officer with whom your family should get in touch.

The location of your birth certificate, your marriage certificate, veteran's discharge certificate, divorce papers.

The location of your safe deposit box and the box key.

The location and types of your insurance policies, the issuing companies, the amount and beneficiary of each policy, the name and address of your insurance agent and other pertinent information.

The location and total of stocks, bonds and other securities you may own, the name and address of your broker.

The location and important details about your mortgage papers, notes, financial agreements.

The location of your bank account or accounts and bank books.

Vital data on your social security card, the location of it the name and address of your employer.

Location of your income tax papers and significant tax records.

Names of your debtors or creditors and a complete description of the amounts and terms involved.

These items are obvious to most of us - but not so obvious and yet so deeply important are such facts as:

The name of your lawyer, his address, telephone number and a list of your papers in his safekeeping.

The name and address of any person to whom you may have given a power of attorney.

Any pension arrangements you may have.

The names of organizations - fraternal, trade, etc. - to which you belong and make a special note here about any benefits which may be coming to your family from these organizations.

Funeral arrangements you prefer and any preparations you've made.

Names and addresses of friends you wish notified in any former as well as your present city, and in this instance think hard about the friends you choose to mention (you may find it as hard as I did to fill out a list as important as this.

Names and addresses of relatives you wish notified at once.

Significant information about your children's medical record - data they might have difficulty collecting if you're not around.

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An inventory of your personal possessions and the approximate value of each with, possibly, directions about the disposition of these possessions.

As you've been reading perhaps you've thought of other facts that would be important in your record and if so, by all means include them.

Then, when you've completed this guide for your family, put it in a safe place - but NOT your safe deposit box. Tell your family or closest friend where the list is, and forget it until you want to bring it up to date a year or from now.

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