

**PUSATIER, SHERMAN, ABBOTT & SUGARMAN, LLP**  
ATTORNEYS AT LAW

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**ABOUT YOUR WILL**

Attached is a copy of your Last Will and Testament, I commend you for having the care and foresight to prepare a Will.

Here are few ideas to keep in mind regarding your Will:

1. If you should move to a different state or country, check to make sure that your Will is valid under the laws of that state or country.
2. You should review your Will whenever there is any change in your personal circumstances, such as a birth, death, remarriage or divorce.
3. If your assets grow substantially, you should have estate tax planning done.
4. You should keep your Will in a safe place; make sure you tell someone that you have a Will and where to find it.
5. You should keep this information sheet with the Will. Attached is a list of your main assets and indicate where your other important personal documents are kept. The list should also include information about your life insurance policies, any jointly owned property and personal retirement plans you have set up, such as IRA or Keogh plans.
6. Do not write on your Will or attempt to change your Will yourself; consult your attorney.
7. Your Executor should contact legal counsel before proceeding with the administration of your estate.

As you know, I have taken steps in the preparation of this Will to simplify the administration of your estate. Of course, I would welcome the opportunity to discuss your Will or your estate with you and the person you have named as Executor.

We are pleased to have been able to serve you in this matter. If you have any other legal questions or needs, please feel free to contact this office at any time.

Pusatier, Sherman, Abbott & Sugarman, LLP



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ASSETS OF \_\_\_\_\_

LOCATION OF ORIGINAL WILL: \_\_\_\_\_

ATTORNEY'S NAME: \_\_\_\_\_

IMPORTANT PERSONAL DOCUMENTS LOCATED: \_\_\_\_\_

**LIFE INSURANCE POLICIES:**

Policy Holder: \_\_\_\_\_  
Policy No.: \_\_\_\_\_  
Address: \_\_\_\_\_

Policy Holder: \_\_\_\_\_  
Policy No.: \_\_\_\_\_  
Address: \_\_\_\_\_

Policy Holder: \_\_\_\_\_  
Policy No.: \_\_\_\_\_  
Address: \_\_\_\_\_

**ALL BANKING INSTITUTIONS:**

Bank: \_\_\_\_\_  
Acct. No.: \_\_\_\_\_  
Address: \_\_\_\_\_

Bank: \_\_\_\_\_  
Acct. No.: \_\_\_\_\_  
Address: \_\_\_\_\_

Bank: \_\_\_\_\_  
Acct. No.: \_\_\_\_\_  
Address: \_\_\_\_\_

**ALL RETIREMENT ASSETS:**

Company: \_\_\_\_\_  
Acct. No./Type: \_\_\_\_\_  
Address: \_\_\_\_\_

Company: \_\_\_\_\_  
Acct. No./Type: \_\_\_\_\_  
Address: \_\_\_\_\_

Company: \_\_\_\_\_  
Acct. No./Type: \_\_\_\_\_  
Address: \_\_\_\_\_

**JOINTLY OWNED OR SEPARATELY OWNED PROPERTY:**

Address: \_\_\_\_\_  
Co-Owner: \_\_\_\_\_  
Mortgage Holder: \_\_\_\_\_

Address: \_\_\_\_\_  
Co-Owner: \_\_\_\_\_  
Mortgage Holder: \_\_\_\_\_

**ADDITIONAL PERSONAL PROPERTY**

Description \_\_\_\_\_  
Location \_\_\_\_\_

Description \_\_\_\_\_  
Location \_\_\_\_\_

Description \_\_\_\_\_  
Location \_\_\_\_\_