

# The Personal Record of

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## Middlesex County Board of Chosen Freeholders

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Charles E. Tomaro, *Deputy Director*

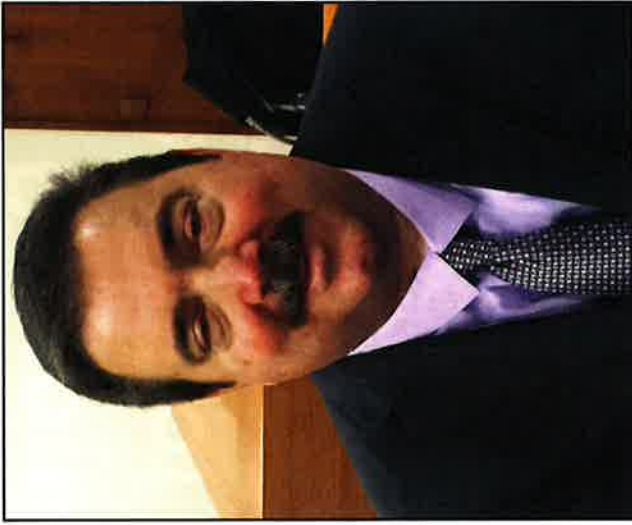
Kenneth Armwood, Charles Kenny, Leslie Koppel, Shanti Narra, Blanquita B. Valenti



KEVIN J. HOAGLAND  
SURROGATE

[www.middlesexcountynj.gov](http://www.middlesexcountynj.gov)

**MIDDLESEX**  
COUNTY • N.J.



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

The Middlesex County Surrogate's Office is open to the public Monday through Friday, 8:00 a.m. to 4:15 p.m. The office is also open Tuesday's from 8:00 a.m. to 6:30 p.m. 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 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.*

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## 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: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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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 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: \_\_\_\_\_

**The Following:**

Attorney \_\_\_\_\_ Phone# \_\_\_\_\_  
Accountant \_\_\_\_\_ Phone# \_\_\_\_\_  
Banker \_\_\_\_\_ Phone# \_\_\_\_\_  
Broker \_\_\_\_\_ Phone# \_\_\_\_\_  
Clergyman/  
Rabbi \_\_\_\_\_ Phone# \_\_\_\_\_  
Doctor \_\_\_\_\_ Phone# \_\_\_\_\_  
Employer \_\_\_\_\_ Phone# \_\_\_\_\_  
Executor \_\_\_\_\_ Phone# \_\_\_\_\_  
of Estate \_\_\_\_\_ Phone# \_\_\_\_\_  
Insurance  
Broker \_\_\_\_\_ Phone# \_\_\_\_\_

**MY PERSONAL DEBTS & LOANS  
OUTSTANDING**

The following people owe me money: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**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 \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

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: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_



## 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: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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## 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 \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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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 \_\_\_\_\_

\_\_\_\_\_