

Leave Your Legacy



This booklet is a tool to help you organize information and record your possessions. Upon completion, it will provide a clear, precise record of your personal and financial information. It can be used to prepare an estate plan; it is also a convenient way of organizing information for your loved ones. You may wish to provide a copy to a family member and your executor as a safeguard against loss.

This document should not be returned to the Junior League of Raleigh or its representatives.

Update your records annually. You should enter the date every time you look over the book even if you don't change any of the information. This will assure the reader of the current accuracy of the entries.

Name _____

Date Revised _____ Date Reviewed _____

PERSONAL INFORMATION

Birth Certificate Yes ☐ No ☐

Birth Certificate located _____

Citizenship: Date/place of naturalization if not U.S. citizen by birth _____

Date of Birth _____

Social Security No. _____

Religious Affiliation _____

Church _____

Address _____

Father's Full Name _____

Mother's Full Name _____

Current Marital Status: Single ☐ Married ☐ Widowed ☐ Divorced ☐ Separated ☐

Spouse's Name _____

Date & State married _____

Certificate located _____

Previous marriage(s) _____

Date _____ Name _____

Marriage ended by Death ☐ Divorce ☐

Date & State _____

Children:

Name _____

Address _____

Name _____

Address _____

Name _____

Address _____

Military Service: Date(s) _____

Service Serial No. _____

Discharge papers located at _____

LIVING WILL DIRECTIVE AND ORGAN DONATION

I have a living will directive stating my wishes for medical care and treatment if I am seriously ill. The document is dated _____ and is located _____.

The names and addresses of those who have copies:

Name _____ Phone _____

Address _____

Name _____ Phone _____

Address _____

I have agreed to donate organs to [organization] _____

The papers are located _____

I have given the following person durable power of attorney which will go into effect upon my inability to act for myself

Name _____ Phone _____

Address _____

LAST WILL AND TESTAMENT

Will written _____ Located _____

Executor of Will _____

Address _____

Lawyer who prepared my will is _____

Firm _____

Location _____

In my will, I have left charitable bequest(s):

Charity _____

Bequest Amount _____

Charity _____

Bequest Amount _____

FUNERAL AND BURIAL ARRANGEMENTS

I have given instructions regarding my funeral in:

Will ☐ Letter ☐ Other ☐

I own:

Cemetery plot ☐ Cemetery vault ☐ None ☐

Name, location _____

Phone _____

Section No. _____ Plot No. _____

Location of deed _____

Other funeral arrangements made _____

BANK ACCOUNTS AND SAFE DEPOSIT BOX

Checking Account:

Bank _____ Account Number _____

Joint ☐ Individual ☐

Bank _____ Account Number _____

Joint ☐ Individual ☐

Savings Account:

Bank _____ Account Number _____

Joint ☐ Individual ☐

Safe Deposit Box Location _____

Box Number _____ Key Location _____

RETIREMENT ACCOUNTS

Company Name _____

Address _____

Account No. _____

Beneficiary _____

Company Pension _____

Social Security _____

Individual Retirement Account - 401(k) or 403(b)

Annuities _____

Beneficiary(ies) _____

Other retirement benefits _____

Beneficiary(ies) _____

INVESTMENTS

I own various stocks and bonds, held in street name,
which are located at _____

Stocks/Bonds/Mutual Funds:

Company _____

Shares _____ Date Purchased _____ Cost Basis _____

Company _____

Shares _____ Date Purchased _____ Cost Basis _____

Company _____

Shares _____ Date Purchased _____ Cost Basis _____

Company _____

Records of purchase and sale are located at _____

I own U.S. Savings Bonds under the following
ownership registrations:

My name alone ☐ Joint with ☐ _____

Type _____ Face Value _____

Issue Date _____ Maturity Date _____

Serial Number _____

Type _____ Face Value _____

Issue Date _____ Maturity Date _____

Serial Number _____

Certificates of Deposit _____

Amount _____ Date of Redemption _____

Certificates of Deposit _____

Amount _____ Date of Redemption _____

Partnerships _____

TRUST FUNDS

Here are brief descriptions of my deposits:

1. Testamentary Trust _____

Trustee _____

Assets in the trust _____

Beneficiaries _____

Attorney of Record _____

Firm _____

Address _____

2. Charitable Remainder Trust

Trustee _____

Assets in the trust _____

Income Recipients _____

Charitable Beneficiaries _____

Papers are located _____

3. Existing Trust

I have created a trust for the benefit of _____

Date it was established _____

The Trust Agreement is located _____

The attorney who drafted the Trust Agreement is:

Firm _____

Address _____

I am a beneficiary under a Trust established by:

Papers are located _____

PERSONAL EMPLOYMENT

My employer is _____

Address _____

My employer has the following benefit plans in which I participate _____

Other business interests _____

I am presently covered by Social Security:

Yes ___ No ___

LIFE INSURANCE

All insurance policies owned by me on my life:

Insurance Company _____

Policy No. _____

Amount of policy _____

Location of policy _____

Beneficiary(ies) _____

Insurance policies owned by others on my life (including charities) _____

Insurance policies which I own on the lives of others:

Location of policies _____

Person insured _____

Address _____

My insurance agents or brokers are:

Name _____

Phone _____

Company & Address _____

Name _____

Phone _____

Company & Address _____

I have unpaid loans against these policies

Policy No. _____

Amount due _____

OTHER INSURANCE

I personally carry accident, disability, sickness, hospitalization and other such forms of insurance - (this is in addition to and exclusive of any such insurance or benefits provided through my employer).

Yes ☐ No ☐

Company _____

Policy No. _____

Coverage _____

My insurance agent is _____

Phone _____

Location of policy(ies) _____

RESIDENCE AND OTHER REAL ESTATE

My residence address is _____

I own my residence Yes ☐ No ☐

Ownership title is held in: _____

My name alone Yes ☐ No ☐

Joint with _____

There is a mortgage on this property Yes ☐ No ☐

It is held by _____

All of the documents concerning this property are located at _____

I own other real estate located at _____

My homeowner's insurance broker is _____

Firm _____

Address _____

TANGIBLE PERSONAL PROPERTY

Automobile(s) _____

Jewelry _____

Art, Antiques, Collectibles _____

Complete inventory of my personal property is located at _____

PERSONAL DEBTORS AND CREDITORS

Name of Debtor _____

Address _____

Amount owed to me _____

Name of Debtor _____

Address _____

Amount owed to me _____

I have the following outstanding loans:

Creditor _____

Loan No. _____

Amount of Loan _____

Date of Final Payment _____

Creditor _____

Loan No. _____

Amount of Loan _____

Date of Final Payment _____

Credit Card Debt:

Company _____

Account No. _____

City _____ State _____

Phone _____

Company _____

Account No. _____

City _____

State _____

Phone _____

TAX RETURNS

My tax preparer is _____

Firm _____

Address _____

Copies of my income tax returns are located at _____

PERSONAL ADVISORS

Physician _____
Address _____
Specialty _____ Phone _____

Physician _____
Address _____
Specialty _____ Phone _____

Clergyperson
Address _____
Phone _____

Attorney
Address _____
Phone _____

Accountant
Address _____
Phone _____

Insurance Agent
Address _____
Phone _____

Trust Officer
Address _____
Phone _____

Investment Broker
Address _____
Phone _____

Tax Consultant
Address _____
Phone _____

Other
Address _____
Phone _____

Other
Address _____
Phone _____

LOCATION OF IMPORTANT PAPERS

Last Will & Testament Bonds and Securities

Vital Statistics _____
Trust Agreements _____

Bank Books _____
Insurance Policies _____
Business Agreements _____
Titles & Deeds _____
Tax Papers _____
Charitable Documents _____

Military Service Documents _____
Others _____

LEAVING YOUR LEGACY

By supporting the Junior League of Raleigh, you help children in your community with access to literacy, health and nutrition, and self-esteem building programs as well as other JLR programs each year. When you make a planned gift to the Junior League of Raleigh you become a Lasting Legacy Society member.

The Lasting Legacy Society is made up of people like you, who want to ensure that the Junior League of Raleigh remains a strong provider of support for all who are in need. There are many options to consider when planning your gifts. You can begin with something as simple as a Memorial Directive, a document which outlines your desire to have remembrances and memorials contributed to the League in lieu of flowers.

Include the Junior League of Raleigh in your Will with a Bequest of any size. All bequests will be directed to the League's endowment, so your gift will sustain the League for years to come.

Please use this tool to help you in the process of deciding how you want to leave your legacy. Contact the Junior League of Raleigh with questions at 919.747.7480 or development@jlraleigh.org.