

## 11 Balmville Road, Suite 2 South • P.O. Box 2395 • Newburgh NY 12550 (845) 561-8000

www.nsglaw.com • nsglaw@nsglaw.com

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9. Grandchildren: Name, sex, date of birth, parentage, residence and marital status		
	al status	Name, sex, date of birth, parentage, residence ε

## OTHER RELATIVES

20.	Parents:	OF CLIENT	OF SI	POUSE
	Father's name and age			
	Address (or date and place of death, if deceased	)		
	Living $\square$	Deceased $\Box$	Living $\square$	Deceased $\square$
	Mother's name and age			
	Address (or date and place of death, if deceased	)		
	Living $\square$	Deceased $\square$	Living $\square$	Deceased $\square$
21.	Other relatives (included in	n Will). Brothers, sisters, grandparents, a	unts, uncles, nieces, nepl	news, etc., with address
22.	Special medical or financia	al needs of self, spouse and dependents _		
		ASSETS		
23.	Stocks, Bonds and other Se	ecurities. How registered (Joint - Surviv	orship – P.O.D. – Trust -	- Custodial)
24	Real Estate: Location and o	eneral description – record owners – how a	and when acquired – estim	nated value - mortgages
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25.	Insurance policies, pension	ns, retirement and death benefits: (Identif	fication and beneficiary)	
26.	Business affiliations and ir	nterests: (details)		
27.	Expectancies: inheritances	s, gifts		
28	Personal effects: including	g furs, jewelry, art, cash on hand and othe	er items of substantial val	ile
20.	Torsonar offeets. Including	, rais, jeweny, art, easir on hand and othe	i items of substantial val	<u></u>
29.	Bank and Savings & Loan	Association Accounts: Savings – Time G	Cert. – Checking – other.	How registered (Joint,
	_	dial)	_	

<ol><li>Safe dependent</li></ol>	osit box: contents, location and how registered	
. Other inv	vestments: nature and in what name(s) held	
-		
. Liabilitie	ss:	
Estimate	d gross estate: \$	
. Estimate	DISPOSITION OF ESTATE	
e bequeathe queathed, i	ecific items of personalty such as jewelry, furs, works of art, silverward, indicate if increments, splits, mergers and substitutions are included indicate if cash dividends are included.	
. Residuar	y Estate – Contingencies over (exoneration of mortgages)	
. Dispositi	on of loans or advances made or to be made	
. Exercise	of powers of appointment or disposition	
. Provisior	ns regarding gifts or bequests to minors or incompetents	
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. Charitabl	le bequests	
. Payment	of inheritance – estate – death taxes	
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. runerai,	burial, monument, services, grave care, etc.	
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