

LAW OFFICES  
**HOFFMAN ♦ DIMUZIO**

A PARTNERSHIP OF PROFESSIONAL CORPORATIONS

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## INVENTORY PACKET

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# INVENTORY OF VALUABLE DOCUMENTS AND/OR IMPORTANT INFORMATION

**DATE COMPLETED:** \_\_\_\_\_

**PERSONAL INFORMATION:**

My full name is: \_\_\_\_\_  
(include maiden name if female and applicable)

Address: \_\_\_\_\_

My date of birth is: \_\_\_\_\_

My Birth Certificate is located at: \_\_\_\_\_

City and State where I was born: \_\_\_\_\_

My Father's name is: \_\_\_\_\_

My Mother's maiden name is: \_\_\_\_\_

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My Social Security Number is: \_\_\_\_\_

My Social Security Card is located: \_\_\_\_\_

My Medicare Number is: \_\_\_\_\_

My Medicare Card is located: \_\_\_\_\_

**FAMILY HISTORY:** (Please check one)

Marital Status:

\_\_\_\_\_ Single/never married

\_\_\_\_\_ Divorced

\_\_\_\_\_ Widow

\_\_\_\_\_ Widower

\_\_\_\_\_ Married

If you are married, please list the name of your spouse: \_\_\_\_\_

Children:

\_\_\_\_\_ I have children.

\_\_\_\_\_ I have no children

My living children are: (should you need additional room, please attach a separate piece of paper.)

Name: \_\_\_\_\_

\_\_\_\_\_ Natural Born Child, or

\_\_\_\_\_ Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Age as of today's date: \_\_\_\_\_

\_\_\_\_\_ I do have a relationship with this child. \_\_\_\_\_ I do not have a relationship with this child.

Name: \_\_\_\_\_

\_\_\_\_\_ Natural Born Child, or

\_\_\_\_\_ Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

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Age as of today's date: \_\_\_\_\_

\_\_\_\_\_ I do have a relationship with this child. \_\_\_\_\_ I do not have a relationship with this child.

Name: \_\_\_\_\_ \_\_\_\_\_ Natural Born Child, or  
\_\_\_\_\_ Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Age as of today's date: \_\_\_\_\_

\_\_\_\_\_ I do have a relationship with this child. \_\_\_\_\_ I do not have a relationship with this child.

Name: \_\_\_\_\_ \_\_\_\_\_ Natural Born Child, or  
\_\_\_\_\_ Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Age as of today's date: \_\_\_\_\_

\_\_\_\_\_ I do have a relationship with this child. \_\_\_\_\_ I do not have a relationship with this child.

My deceased children are:

Name: \_\_\_\_\_ \_\_\_\_\_ Natural Born Child, or  
\_\_\_\_\_ Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Date of death: \_\_\_\_\_

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Name: \_\_\_\_\_  Natural Born Child, or  
 Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Date of death: \_\_\_\_\_

Name: \_\_\_\_\_  Natural Born Child, or  
 Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Date of death: \_\_\_\_\_

Name: \_\_\_\_\_  Natural Born Child, or  
 Adopted

Address: \_\_\_\_\_

Birth date: \_\_\_\_\_

Date of death: \_\_\_\_\_

**REAL ESTATE:**

Current Residence.

I own my home.

I rent my home.

If you own your home:

Address: \_\_\_\_\_

Do you live there currently?  Yes  No

Is there a mortgage on the property currently?  Yes  No

If so, the mortgage company's name is: \_\_\_\_\_

Mortgage Company's address is: \_\_\_\_\_

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The Loan number is: \_\_\_\_\_

The deed to the property is located: \_\_\_\_\_

Mortgage Company's address is:  
\_\_\_\_\_

If there is a mortgage company, do you have mortgage insurance on this property (if there is a current mortgage): \_\_\_\_\_ Yes \_\_\_\_\_ No

The mortgage insurance company is: \_\_\_\_\_

The Policy number is: \_\_\_\_\_

Investment Property(ies)

\_\_\_\_\_ I have investment property(ies). \_\_\_\_\_ I do not have investment property(ies).  
(such as vacation homes, property, timeshares)

Address: \_\_\_\_\_

Do you live there currently? \_\_\_\_\_ Yes \_\_\_\_\_ No

Is this property currently rented? \_\_\_\_\_ Yes \_\_\_\_\_ No

Is there a mortgage on the property currently? \_\_\_\_\_ Yes \_\_\_\_\_ No

If so, the mortgage company's name is: \_\_\_\_\_

The Loan number is: \_\_\_\_\_

The deed to the property is located: \_\_\_\_\_

Mortgage company's address is: \_\_\_\_\_

If there is a mortgage company, do you have mortgage insurance on this property (if there is a current mortgage): \_\_\_\_\_ Yes \_\_\_\_\_ No

The mortgage insurance company is: \_\_\_\_\_

The Policy number is: \_\_\_\_\_

Should you need additional room, please attach a separate piece of paper

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**PERSONAL PROPERTY (consists of a considerable value):**

\_\_\_\_\_ I have personal property. \_\_\_\_\_ I do not have personal property.  
Please list on a separate piece of paper.

**ESTATE PLANNING DOCUMENTS:**

Will:

\_\_\_\_\_ I have a Will \_\_\_\_\_ I do not have a Will.

My Will is located at: \_\_\_\_\_

My Executor/Executrix is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

My Alternate Executor/Executrix is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Does anyone have a copy of your Will? \_\_\_\_\_ Yes \_\_\_\_\_ No

If so, whom: \_\_\_\_\_

**Living Will/Health Care Directive:**

\_\_\_ I have a Living Will/Health Care Directive \_\_\_ I do not have a Living Will/Health Care Directive

My Living Will/Health Care Directive is located at: \_\_\_\_\_

My Primary Health Care Representative is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

My Alternate Health Care Representative is: \_\_\_\_\_

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His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Does anyone have a copy of your Living Will/Health Care Directive? \_\_\_\_ Yes \_\_\_\_ No

If so, whom: \_\_\_\_\_

Power of Attorney:

\_\_\_\_\_ I have a Power of Attorney                      \_\_\_\_\_ I do not have a Power of Attorney

My Power of Attorney is located at: \_\_\_\_\_

My Primary Attorney in Fact is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

My Alternate Attorney in Fact is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Does anyone have a copy of your Power of Attorney? \_\_\_\_ Yes \_\_\_\_ No

If so, whom: \_\_\_\_\_

Living Trust:

\_\_\_\_\_ I have a Living Trust    \_\_\_\_\_ I have a Living Trust

My Living Trust is located at: \_\_\_\_\_

My Primary Trustee is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

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My Alternate Trustee is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Does anyone have a copy of your Living Trust? \_\_\_\_\_ Yes \_\_\_\_\_ No

If so, whom: \_\_\_\_\_

**BANKING:**

Checking Accounts:

\_\_\_\_\_ I have a Checking Account. \_\_\_\_\_ I do not have a Checking Account.

Bank Name: \_\_\_\_\_

Branch Address in which you do business with: \_\_\_\_\_

Account Number: \_\_\_\_\_

My checkbook is located at: \_\_\_\_\_

My cancelled checks are located at: \_\_\_\_\_

My monthly statements are located at: \_\_\_\_\_

Additional Checking Accounts:

\_\_\_\_\_ I have additional checking accounts \_\_\_\_\_ I do not have an additional checking Accounts.

If so,:

Bank Name: \_\_\_\_\_

Branch Address in which you do business with: \_\_\_\_\_

Account Number: \_\_\_\_\_

My checkbook is located at: \_\_\_\_\_



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My cancelled checks are located at: \_\_\_\_\_

My monthly statements are located at: \_\_\_\_\_

Savings Account:

\_\_\_\_\_ I have an additional Savings Account \_\_\_\_\_ I do not have an additional Savings Account

Bank Name: \_\_\_\_\_

Branch Address in which you do business with: \_\_\_\_\_

Account Number: \_\_\_\_\_

My monthly statements are located at: \_\_\_\_\_

Additional Savings Accounts:

\_\_\_\_\_ I have a Checking Account. \_\_\_\_\_ I do not have a Checking Account.

Bank Name: \_\_\_\_\_

Branch Address in which you do business with: \_\_\_\_\_

Account Number: \_\_\_\_\_

My monthly statements are located at: \_\_\_\_\_

Certificate of Deposit:

\_\_\_\_\_ I have a Certificate of Deposit \_\_\_\_\_ I do not have a Certificate of Deposit

Certificate of Deposit Number: \_\_\_\_\_

Face value amount: \_\_\_\_\_

My Certificate of Deposit is located at: \_\_\_\_\_

Additional Certificates of Deposit:

\_\_\_\_\_ I have additional Certificates of Deposit \_\_\_\_\_ I do not have additional Certificate of Deposit

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Certificate of Deposit Number: \_\_\_\_\_

Face value amount: \_\_\_\_\_

My Certificate of Deposit is located at: \_\_\_\_\_

Money Market Funds:

\_\_\_\_ I have a Money Market Fund                      \_\_\_\_\_ I do not have a Money Market Fund

Money Market Fund Number: \_\_\_\_\_

Bank/InstitutionName: \_\_\_\_\_

Branch Institution Address: \_\_\_\_\_

My monthly statements are located at: \_\_\_\_\_

Additional Money Market Funds:

\_\_\_\_ I have additional Money Market Funds      \_\_\_\_\_ I do not have additional Money Market Funds

Money Market Fund Number: \_\_\_\_\_

Bank/InstitutionName: \_\_\_\_\_

Branch Institution Address: \_\_\_\_\_

My monthly statements are located at: \_\_\_\_\_

Safety Deposit Box:

\_\_\_\_ I have a Safety Deposit Box                      \_\_\_\_\_ I do not have a Safety Deposit Box

My box number is: \_\_\_\_\_

My Safety Deposit Box is located at: \_\_\_\_\_  
(banking institution)

My key is located: \_\_\_\_\_

Those who have the right to enter my Safety Deposit Box is/are: \_\_\_\_\_

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The following items are in my Safety Deposit Box: \_\_\_\_\_

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Annuity:

\_\_\_\_\_ I have an Annuity                      \_\_\_\_\_ I do not have an Annuity

Annuity is with: (company): \_\_\_\_\_

Policy Number: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

The Annuity is located at: \_\_\_\_\_

Additional Annuities:

\_\_\_\_\_ I have an additional Annuity                      \_\_\_\_\_ I do not have an additional Annuity

Annuity is with: (company): \_\_\_\_\_

Policy Number: \_\_\_\_\_

Purchase Price: \_\_\_\_\_

The Annuity is located at: \_\_\_\_\_



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Medicare Part D. coverage.

\_\_\_\_\_ I have Medicare Part D. coverage.      \_\_\_\_\_ I do not have Medicare Part D. coverage

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Life Insurance.

\_\_\_\_\_ I have Life Insurance      \_\_\_\_\_ I do not have Life Insurance

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Face Amount: \_\_\_\_\_

The policy is located at: \_\_\_\_\_

Additional Life Insurance Policies.

\_\_\_\_\_ I have Life Insurance      \_\_\_\_\_ I do not have Life Insurance

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Face Amount: \_\_\_\_\_

The policy is located at: \_\_\_\_\_

Disability Insurance.

\_\_\_\_\_ I have disability insurance.      \_\_\_\_\_ I do not have disability insurance

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Face Amount: \_\_\_\_\_

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The policy is located at: \_\_\_\_\_

Additional Disability Insurance.

\_\_\_\_\_ I have additional disability insurance.      \_\_\_\_\_ I do not have additional disability insurance

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Face Amount: \_\_\_\_\_

The policy is located at: \_\_\_\_\_

Long Term Care Insurance.

\_\_\_\_\_ I have Long Term Care Insurance      \_\_\_\_\_ I do not have Long Term Health Care Insurance

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Face Amount: \_\_\_\_\_

The policy is located at: \_\_\_\_\_

Additional Long Term Care Insurance.

\_\_\_\_\_ I have additional Long Term Care Insurance

\_\_\_\_\_ I do not have additional Long Term Health Care insurance

Name of Insurance Company: \_\_\_\_\_

My Policy No: \_\_\_\_\_

Face Amount: \_\_\_\_\_

The policy is located at: \_\_\_\_\_

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**PENSION, IRA, 401K AND OTHER RETIREMENT PLANS.**

Pension.

\_\_\_\_\_ I have a pension.

\_\_\_\_\_ I do not have a pension.

My Pension Administrator is: \_\_\_\_\_

My Plan Name is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my pension are located at: \_\_\_\_\_

Additional Pension Plans.

\_\_\_\_\_ I have additional pension plan(s)

\_\_\_\_\_ I do not have additional pension plan(s)

My Pension Administrator is: \_\_\_\_\_

My Plan Name is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my pension are located at: \_\_\_\_\_

Individual Retirement Accounts (IRA).

\_\_\_\_\_ I have an IRA.

\_\_\_\_\_ I do not have an IRA.

My IRA is with the following Institution. \_\_\_\_\_

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My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my IRA are located at: \_\_\_\_\_

Additional Individual Retirement Accounts (IRA).

\_\_\_\_\_ I have additional IRA(s).                      \_\_\_\_\_ I do not have additional IRA(s).

My IRA is with the following Institution. \_\_\_\_\_

My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my IRA are located at: \_\_\_\_\_

401K Accounts/Plan:

\_\_\_\_\_ I have a 401k account                      \_\_\_\_\_ I do not have a 401k account.

My 401k account is with the following Institution. \_\_\_\_\_

My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my 401k are located at: \_\_\_\_\_



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Additional 401K Accounts.

\_\_\_\_\_ I have additional 401k account(s)      \_\_\_\_\_ I do not have additional 401k account(s).

My 401k account is with the following Institution. \_\_\_\_\_

My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my 401k are located at: \_\_\_\_\_

403B Accounts/Plan:

\_\_\_\_\_ I have a 403B account      \_\_\_\_\_ I do not have a 403B account.

My 403B account is with the following Institution. \_\_\_\_\_

My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my 403B are located at: \_\_\_\_\_

Additional 403B Accounts.

\_\_\_\_\_ I have additional 403B account(s)      \_\_\_\_\_ I do not have additional 403B account(s).

My 403B account is with the following Institution. \_\_\_\_\_

My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to my 403B are located at: \_\_\_\_\_

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Additional Retirement Plans.

Type of Account: \_\_\_\_\_

My Plan/Identification Number is: \_\_\_\_\_

Address is: \_\_\_\_\_

Telephone Number: \_\_\_\_\_

Any and all documents related to the above are located at: \_\_\_\_\_

**INVESTMENT ACCOUNTS:**

\_\_\_\_\_ I have investment accounts such as stocks, bond, mutual funds and or similar type accounts.

\_\_\_\_\_ I do not have investment accounts such as stocks, bond, mutual funds and or similar type accounts.

Any and all documents related to the above account(s) are located at: \_\_\_\_\_

Investment Advisor.

\_\_\_\_\_ My investments are held by my investment supervisor.

\_\_\_\_\_ My investments are not held by my investment supervisor.

Stock Certificates.

\_\_\_\_\_ My stock certificates in my possession.

\_\_\_\_\_ My stock certificates are not in my possession.

My stock certificates are located at: \_\_\_\_\_

List of Investments:

\_\_\_\_\_ A list of my investments is attached hereto. \_\_\_\_\_ A list of my investments is not attached hereto

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**CREDIT CARDS:**

Account Information:

\_\_\_\_\_ I have outstanding balances on my credit cards

\_\_\_\_\_ I do not have any outstanding credit card balances.

Attached hereto is a list of my credit cards, showing banks, accounts numbers and balances.

Credit Card Insurance Information:

\_\_\_\_\_ I have credit card insurance benefits, (travel insurance, disability insurance, and or death benefits).

\_\_\_\_\_ I do not have credit card insurance benefits, (travel insurance, disability insurance, and or death benefits).

Attached hereto is a list of any and all insurance benefit information.

**ADVISORS:**

My attorney is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

My Primary Doctor is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

My Accountant is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

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My Stock Broker/Investment Advisor is: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

My Religious Advisor/Clergy: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Other: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Other: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

**FUNERAL ARRANGEMENTS:**

Funeral Director: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

\_\_\_\_\_ I want a viewing .

\_\_\_\_\_ I do not want a viewing.

\_\_\_\_\_ I want to be buried.

\_\_\_\_\_ I do not want to be buried.

\_\_\_\_\_ I want to be cremated.

\_\_\_\_\_ I do not want to be cremated.

\_\_\_\_\_ I want a church service.

\_\_\_\_\_ I do not want a church service.

\_\_\_\_\_ I want a service in the funeral home.

\_\_\_\_\_ I do not want a church service in the funeral home.

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\_\_\_\_\_ I have prepaid for my funeral.

\_\_\_\_\_ I have not prepaid for my funeral.

The contract and/or any documents surrounding my prepaid funeral are located at: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_ I own a cemetery plot.

\_\_\_\_\_ I do not own a cemetery plot.

\_\_\_\_\_ I own a mausoleum plot.

\_\_\_\_\_ I do not own a cemetery plot.

The plot is located at: \_\_\_\_\_

\_\_\_\_\_

Other: \_\_\_\_\_

**PEOPLE TO NOTIFY IN CASE OF EMERGENCY OR DEATH:**

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

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His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

**ADDITIONAL SHEETS ATTACHED:**

\_\_\_\_\_ I have attached additional sheets to this form.

\_\_\_\_\_ I have not attached additional sheets to this form.

The total number of sheets attached hereto is: \_\_\_\_\_

\_\_\_\_\_ A COPY OF THIS FORM **IS** ON FILE AT MY ATTORNEY'S OFFICE

\_\_\_\_\_ A COPY OF THIS FORM IS **NOT** ON FILE AT MY ATTORNEY'S OFFICE

Additional Persons who possess a copy of this form, if any.

Name: \_\_\_\_\_

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His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_

Name: \_\_\_\_\_

His/her address is: \_\_\_\_\_

His/her telephone number is: \_\_\_\_\_











