

About Your Motor Vehicles

— Car, Truck, RV, Motorcycle, Boat, Airplane —

It is not unusual for people to own (or lease) a number of motor vehicles. This section will provide space for two automobiles, an RV, and a boat. If you have additional vehicles, please make additional copies of this form. If you own any collectible or antique vehicles, particular attention must be paid to the value and disposition of the vehicle(s) upon your death.

Automobile — One

Automobile — One	Details About This Vehicle
What is the year, make, model?	
Vehicle identification number (VIN)?	
License plate number?	
When does the registration have to be renewed, and how much is the fee?	
Are there any special taxes due? If so, enter the approximate amount and due date.	
What is the date that this vehicle was purchased, and what was the purchase price?	
How is the title held? Enter the information as it appears on your registration or certificate of ownership.	
Is the vehicle being financed (or leased)? If so, enter the financing institution, its name and address, and the loan (or lease) number. If the vehicle is not financed, and the title is clear, indicate where the certificate of ownership (title) is kept.	
When is the last payment due? If the vehicle is leased, are there any end-of-lease settlement fees?	
Is the vehicle under warranty or does it have an extended service contract? If so, briefly enter the terms of the warranty, the service contract number, and where the documents are kept.	
Who services the vehicle?	
At what intervals do you change the oil, get a tune-up, rotate the tires, etc.?	
Who insures the vehicle? Enter the name, address, and telephone number of the insurance company; list the agent's name and telephone extension, and the policy number.	
How much are the premiums, and when are they due?	
What will your beneficiary do with this vehicle upon your death?	

About Your Motor Vehicles

Automobile — Two

Automobile — Two	Details About This Vehicle
What is the year, make, model?	
Vehicle identification number (VIN)?	
License plate number?	
When does the registration have to be renewed, and how much is the fee?	
Are there any special taxes due? If so, enter the approximate amount and due date.	
What is the date that the vehicle was purchased, and what was the purchase price?	
How is the title held? Enter the information as it appears on your registration or certificate of ownership.	
Is the vehicle being financed (or leased)? If so, enter the financing institution, its name and address, and the loan (or lease) number. If the vehicle is not financed, and the title is clear, indicate where the certificate of ownership (title) is kept.	
When is the last payment due? If the vehicle is leased, are there any end-of-lease settlement fees?	
Is the vehicle under warranty or does it have an extended service contract? If so, briefly enter the terms of the warranty, the service contract number, and where the documents are kept.	
Who services the vehicle?	
At what intervals do you change the oil, get a tune-up, rotate the tires, etc.?	
Who insures the vehicle? Enter the name, address, and telephone number of the insurance company; list the agent's name and telephone extension, and the policy number.	
How much are the premiums, and when are they due?	
What will your beneficiary do with this vehicle upon your death?	

About Your Motor Vehicles

Recreational Vehicle (RV)

RV	Details About the RV
What is the year, make, model?	
Vehicle identification number (VIN)?	
License plate number?	
When does the registration have to be renewed, and how much is the fee?	
Are there any special taxes due? If so, enter the approximate amount and due date.	
What is the date that the RV was purchased, and what was the purchase price?	
How is the title held? Enter the information as it appears on your registration or certificate of ownership.	
Is the RV being financed (or leased)? If so, enter the financing institution, its name and address, and the loan (or lease) number. If the vehicle is not financed, and the title is clear, indicate where the certificate of ownership (title) is kept.	
When is the last payment due? If the RV is leased, are there any end-of-lease settlement fees?	
Is the RV under warranty or does it have an extended service contract? If so, briefly enter the terms of the warranty, the service contract number, and where the documents are kept.	
Who services the RV?	
At what intervals do you change the oil, get a tune-up, rotate the tires, etc.?	
Where is the RV stored, and what are the monthly storage fees?	
Who insures the RV? Enter the name, address, and telephone number of the insurance company; list the agent's name and telephone extension, and the policy number.	
How much are the premiums, and when are they due?	
What will your beneficiary do with this vehicle upon your death?	

About Your Boat

Boat	Details About the Boat
What is the year, make, model?	
Identification number?	
CF number?	
When does the registration have to be renewed, and how much is the fee?	
Are there any special taxes due? If so, enter the approximate amount and due date.	
What is the date that the boat was purchased, and what was the purchase price?	
How is the title held? Enter the information as it appears on your registration or certificate of ownership.	
Is the boat being financed (or leased)? If so, enter the financing institution, its name and address, and the loan (or lease) number. If the vehicle is <i>not</i> financed, and the title is clear, indicate where the certificate of ownership (title) is kept.	
When is the last payment due? If the boat is leased, are there any end-of-lease settlement fees?	
Is the boat under warranty or does it have an extended service contract? If so, briefly enter the terms of the warranty, the service contract number, and where the documents are kept.	
Who services the boat? Where are the maintenance records (or logbook)?	
At what intervals do you change the oil, get a tune-up, clean and paint the bottom, etc.?	
Who insures the boat? Enter the name, address and telephone number of the insurance company; list the agent's name and telephone extension, and the policy number.	
How much are the premiums, and when are they due?	
What will your beneficiary do with the boat upon your death?	

Special Notes: Use this space for information about dock and storage fees and additional details about the boat, such as partners in ownership, etc.

An Inventory of Your Valuables

Nine months after death, the IRS may require a death tax return to be filed. This inventory will help to save time and fees in evaluating these assets. If your survivor chooses to sell all or part of this inventory, this list will serve as a guide for accurate pricing. The inventory list will also help speed up a claim in the event of a casualty loss.

Item (Brief Description)	Purchase Date	Purchase Price	Appraised (Yes — No)	Appraised Value

Do you keep a file of receipts and appraisals? Where is it located?

An Inventory of Your Warrantied Items

You accumulate many items throughout your lifetime. In your absence, some of these items may need repair and may still be under warranty. By keeping this list up-to-date, you may save your estate and your survivors a great deal of money for repair and service. The list will also be helpful to your insurance company in the event of a loss.

Item and Model Number	Serial Number	Purchase Price	Under Warranty	Warranty Expires

Do you keep a file of warranty papers and user manuals? Where is it located?

Who Performs Your Home Maintenance?

Type of Maintenance	Name	Telephone Number	Service Cont. Number	Contract Expires?
Plumber				
Electrician				
Appliance repair				
TV repair				
Heating Air conditioning				
Landscaping service				
Painter				
Swimming pool				
Alarm or security				
Window cleaning				
Roof repair				
Gas and electric company				
Telephone company				
Domestic help (maid)				
Pet groomer				
Veterinarian				
Chimney sweep				
Exterminator				
Snow removal				

Do you keep a file of service contracts? Where is it located?

