

# Estate of John F and Joan H Brenner

## Beneficiary Instructions

### 11/26/17

#### General Structure

Brenner Family Trust established - it owns (or will own) everything of substantial value.

Details are provided in "Protecting Your Assets", a notebook from the attorney who set it up: Stephen T DiGregorio (contact info below).

Q&A regarding the legalese explained in "Trust\_Q&A Brenner.pdf" in this folder ("Trust, Wills, etc", on the desktop of Ruby).

#### Useful Contacts

Stephen T. DiGregorio (Attorney)

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Suite 404

Lynnfield, MA 01940

Phone: 978-210-9666

E-Mail: [attorneysd@protectingyourassets.com](mailto:attorneysd@protectingyourassets.com)

Randy Gregory (Financial Advisor)\*

33 MacArthur Road

Beverly, MA 01915

Cell: 617-953-5719

E-Mail: [rsg876@msn.com](mailto:rsg876@msn.com)

\*Randy is moving, probably out of state; I may set things up with another advisor, or I may simply use TIAA-CREF for guidance.

#### Locations of Documents

"Protecting Your Assets" is a notebook in one of my file drawers in the family room. I had intended to copy it and give copies to Robin and Crystal, but I have it in multiple places on the computers, and it has a lot of pages! Look for it on the desktop of Ruby, along with other financial documents, in the Emergency Information folder

Ruby Login: Username: Jeff, Password: phasor41

Financial On Line Access Information (**current as of 1/21/20**). follows. Other non financial On Line Access material is in the "On Line Info" subfolder. It is likely to be the most current.

**Bank of America (All personal accounts/credit cards)**

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<i>Item</i>	<i>User Name</i>	<i>Password</i>	<i>Secret Quest</i>
<b>BOA Checking</b>	<b>Route: 011000138</b>	<b>Acct: 000047227364</b>	
<b>BOA "all access"</b>	<b>Via telephone?</b>	<b>phasor (Verbal Password)</b>	
<b>BOA Net Access, Jeff (cell too)</b>	<b>41jfbrenner</b>	<b>Phasor@41</b>	<b>Cambridge Ford Falcon Geils</b>
<b>BOA Net Access, Joan</b>	<b>40jhbrenner</b>	<b>Phasor40</b>	<b>Hillyard</b>
<b>BOA ATM Card (JHB)</b>	<b>5877-8102-1747-8586 (4/17)</b>	<b>23574</b>	
<b>BOA ATM Card (JFB)</b>	<b>5877-8120-0633-1786 (5/19)</b>	<b>23574</b>	
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<b>BOA Shares - Joan ComputerShare</b>	<b>jhbrenner40</b>	<b>Phasor40</b>	<b>Pin: 2357 Francis, cat, Cambridge honors physics astronomy</b>
<b>BOA Secure e-mail</b>	<b>jfbrenner@verizon.net</b>	<b>phasor41</b>	<b>Ford Falcon Geils Charleston high</b>

**TIAA - CREF**

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<i>Access type</i>	<i>UserName</i>	<i>Password</i>	<i>Pin/question answer</i>
<b>Net access: <a href="https://www.tiaa.org/public/index.html">https://www.tiaa.org/public/index.html</a></b>			
<b>TIAA-CREF</b>	<b>jfbrenner</b>	<b>kids7477</b>	<b>(PIN 1052468)</b>
<b>Phone: TIAA-CREF</b>	<b>jfbrenner</b>	<b>54377477</b>	<b>Schirmer (Mother maiden)</b>

**NY Life Annuities**

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	<i>UserName</i>	<i>Password/Pin</i>
<b>NY Life (annuities Jeff)</b>	<b>jfbrenner</b>	<b>23574CBRB</b>
<b>Contract # 74 233 971</b>		
<b>1-800-695-9873</b>		
<b>NY Life (annuities Joan)</b>	<b>jhbrenner</b>	<b>23574CBRB</b>
<b>Contract # 74 233 972</b>		
<b>1-800-695-9873</b>		
<b>NY Life (annuities NFT)</b>	<b>jhbrenner</b>	<b>23574CBRB</b>
<b>Noe Family Trust (Joan SS)</b>		
<b>Contract # 74 234 377</b>		
<b>1-800-695-9873</b>		
<b>NY Life (nylifesecurities.com)</b>	<b>ID: 6531177259</b>	<b>Pin: 235741</b>
<b>Noe Family Trust (Joan SS)</b>		<b>Old Pin: 85035470</b>
<b>Advisor 1 # N23-976229</b>		
<b>1-800-695-4785</b>		

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## Credit Cards and Other Accounts

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<i>Card</i>	<i>Card Number</i>	<i>Exp</i>	<i>CCV</i>	<i>CID</i>	<i>Account #</i>	
AMEX GOLD (Jeff)	3718-648703-17005	04/24	1385	420	349990772713****	New: 4/29/19
AMEX GOLD (Joan)	3718-648703-14010	04/20	4710		349990772713****	
AMEX Fraud Line:	888-800-5234					
BOA MC	5466-3202-2745-7973	04/24	015		5466320227457973	Active
BOA VISA	4400-6612-4795-1301	01/24	070		4400661247951301	Pin 2357
HELOC (Jeff) (7399)	4189-5601-0172-8309	08/23	897		68871806787399	Pin 378339
HELOC (Joan) (7399)	4189-5601-0172-8317	08/23	411		68871806787399	Pin 823877
BOA Checking					000047227364	
BOA Linked ATM					5877810217478586	
CHASE SAPH VISA	4147-2020-3196-6557	08/23	102		4147202031966557	

## Joan: BOA Stock

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BANK OF AMERICA DES:

DV01DC1503  
ID:C0003076792BAC  
INDN:JOAN HUDSON BRENNER  
CO ID:2431912740 PPD

<i>Computer Access through</i>	<i>User ID</i>	<i>Password</i>	<i>Security Answers</i>
ComputerShare	jhbrenner40 Cambridge,	Phasor40	Francis, cat,  honors physics, astronomy