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)

 220 Broadway (Rte. 1 South)
 Suite 404
 Lynnfield, MA 01940

 Phone: 978-210-9666

 E-Mail: attorneysd@protectingyourassets.com

 Randy Gregory (Financial Advisor)\*

 33 MacArthur Road

 Beverly, MA 01915

 Cell: 617-953-5719

 E-Mail: 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)***---------------------------------------------------------------------------------------------------------------------------------------------------------------

*Item User Name Password Secret Quest*

-------------------------------------------------------------------------------------------------------------------------------------
BOA Checking Route: 011000138 Acct: 000047227364

BOA "all access" Via telephone? phasor (Verbal Password)

BOA Net Access, Jeff (cell too) 41jfbrenner Phasor@41 Cambridge

 Ford Falcon

 Geils

BOA Net Access, Joan 40jhbrenner Phasor40 Hillyard

BOA ATM Card (JHB) 5877-8102-1747-8586 (4/17) 23574

BOA ATM Card (JFB) 5877-8120-0633-1786 (5/19) 23574

-----------

BOA Shares - Joan jhbrenner40 Phasor40 Pin: 2357

 ComputerShare Francis, cat, Camridge

 honors physics astronomy

BOA Secure e-mail jfbrenner@verizon.net phasor41 Ford Falcon

 Geils

 Charleston high

***TIAA - CREF***

---------------------------------------------------------------------------------------------------------------------

*Access type UserName Password Pin/question answer*

Net access: https://www.tiaa.org/public/index.html

TIAA-CREF jfbrenner kids7477 (PIN 1052468)

Phone: TIAA-CREF jfbrenner 54377477 Schirmer (Mother maiden)

***NY Life Annuities***

---------------------------------------------------------------------------------------------------------------------

 *UserName Password/Pin*

NY Life (annuities Jeff) jfbrenner 23574CBRB

 Contract # 74 233 971

 1-800-695-9873

NY Life (annuities Joan) jhbrenner 23574CBRB

 Contract # 74 233 972

 1-800-695-9873

NY Life (annuities NFT) jhbrenner 23574CBRB

 Noe Family Trust (Joan SS)

 Contract # 74 234 377

 1-800-695-9873

NY Life (nylifesecurities.com) ID: 6531177259 Pin: 235741

 Noe Family Trust (Joan SS) Old Pin: 85035470

 Advisor 1 # N23-976229

 1-800-695-4785

---------

## Credit Cards and Other Accounts

-----------------------------------------------------------------------------------------------------------------------------------

*Card Card Number Exp CCV CID Account #*

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

68871806787399

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

-------------------------------------------------------------------------------------------------------------------------------------

BANK OF AMERICA DES:

DV01DC1503

 ID:C0003076792BAC

 INDN:JOAN HUDSON BRENNER

CO ID:2431912740 PPD

*Computer Access through User ID Password Security Answers*

ComputerShare jhbrenner40 Phasor40 Francis, cat, Cambridge,

 honors physics,

 astronomy