

## Table of Contents - Estate Planning Binder

As of: February 1, 2022

- = password protected (on <http://www.rs4l.org/ESTATE/estate.htm>)
- Items in black have mostly been entered on the website.

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#### • 01) Last Will & Testament

3. March 5, 2019. Most recent version. Signed copy in Loose-leaf binder. Original: Estate Planning Ikea file at Rivermead. *01-01*
2. August 17, 2004. Obsolete. Signed copy in Loose-leaf binder. *01-02*
1. December 19, 1997. Obsolete. Signed copy in Loose-leaf binder. Can't find original doc or pdf. *01-03*

#### • 02) Durable General Power of Attorney

2. May 28, 2019. Most recent. Signed copy in Loose-leaf binder. Original: Upton & Hatfield. *02-02*
1. August 17, 2004. Obsolete. Signed copy in Loose-leaf binder. Original: ? *02-01*

#### • 03) Declaration (Health Care)

1. Most recent version: October 22, 1997. Original: ? *03-01*

#### • 04) Durable Power of Attorney for Health Care

3. May 28, 2019. Most recent version. Signed copy in Loose-leaf binder. Original: Upton & Hatfield, Peterborough, NH. *04-03*
2. May 28, 2019. Acknowledgement that originals will be retained by Upton & Hatfield *04-02*
1. August 17, 2004. Obsolete. Signed copy in Loose-leaf binder. Original: ? *04-01*

#### • 05) Declaration of Trust and Amendment(s)

5. Third Amendment. March 5, 2019. Most recent version. Signed copy in Loose-leaf binder. Original: *05-01*
4. Second Amendment. June 21, 2011. Obsolete. Signed copy in Loose-leaf binder. Original: *05-02*
3. Amendment. August 17, 2004. Obsolete. Signed copy in Loose-leaf binder. Original: *05-03*
2. First Amendment. November 18, 1998. Obsolete. Signed copy in Loose-leaf binder. Original: *05-04*
1. Original. December 19, 1997. Obsolete. Signed copy in Loose-leaf binder. Original: *05-05*

#### • 06) 347 Main Street Revocable Trust

3. Most recent version: May 23, 2011. *06-03*
2. No changes except trust assets. August 17, 2004. Obsolete. *06-02*
1. Original version. December 19, 1997. Obsolete. *06-01*

07) Deed of Gift re all personal property (May 23, 2011). *07-01*

08) Acceptance of Trustees

5. Robert B. Stephenson Trust. Resignation of Trustee. January 1, 2017. *08-05*
4. Robert B. Stephenson Trust. Acceptance of Appointment. E. Amory Loring. Undated. *08-04*
3. 2016 Amendment of the Robert B. Stephenson Trust. December 15, 2016. *08-03*
2. Letter from Bill Perkins to Robert B. Stephenson re Amory succeeding Hugh Warren as a Trustee. December 2, 2016. *08-02*
1. Acceptance of Trustees. December 23, 1997. *08-01*

• **09) Instructions & Guidance upon the Death of Robert B. Stephenson**

- 10. Most recent version: April 25, 2010. *09-01*
- 9. My Obituary *09-02*
- 8. Peterborough Marble & Granite. *09-03*. See also *11-05*
- 7. My Personal Effects *09-04*
- 6. Digital Resources *09-05*. See also *18-01*
- 5. Antarctic Collection *09-06*. See also *18-02*
- 4. Jaffrey Historical Society *09-07*. See also *15-14*
- 3. Historical Society of Cheshire County *09-08*. See also *15-09*
- 2. My Chest of Memories (Historical Society of Cheshire Country) *09-09*. See also *15-09.2*
- 1. Osher Map Library *09-10*. See also *15-21*

**10) Property Deeds**

1. 347 Main Street (January 8, 1998). SOLD HOUSE on September 21, 2020. *10-01*
2. Deed to Unit 2, 8 Main Street, Jaffrey, NH. (November 17, 2008). *10-02*

**11) Cemetery Deeds and Information**

1. Deed for cemetery plot Old Burying Ground, Jaffrey Center, NH. *11-01*
2. Deed for cemetery plot, Newton Cemetery, Newton, MA. *11-02*
3. Acceptance of \$500 for perpetual maintenance of evergreen planting at plot in Newton Cemetery, July 7, 1976. *11-03*
4. Information on Newton Cemetery, Newton, MA. *11-04*
5. Peterborough Marble & Granite, Peterborough, NH—Instructions and images. *11-05*

• **12) Various beneficiary designations and related**

6. Confirmation of Beneficiary Designations, TIAA-CREF March 23, 2011. *12-01*
5. Affinion Group February 14, 2011, Accidental Death and Dismemberment Insurance Coverage through TD Banknorth [may have been discontinued]. *12-02*
4. USAA Trust Questionnaire. 2 copies. *12-03*
3. Fidelity Investments, March 10, 1998, 6pp. *12-04.1-4.6*
2. Fidelity Mutual Fund Beneficiary Designation, February 17, 1998, 1p plus 2 letters. *12-05*
1. Designation of Beneficiary, TIAA-CREF, March 3, 1998, 1p. plus letter and numerous other forms from Fidelity and TIAA-CREF. *12-06*

**13) Rivermead**

1. Disclosure Statement *13-01*
2. Rivermead Payment Summary *13-02*

• **14) Passwords & Keys**

- 1. Passwords.docx & .pdf *14-01*
- 2. Password Excel Spreadsheet *14-02*

• **15) Regarding specific bequests & distributions**

- 15-01. ACLU Foundation of New Hampshire
- 15-02. Boston Athenaeum
- 15-03. Buckingham Browne & Nichols School (BB&N)
- 15-04. Dartmouth College
- 15-05. Doctors Without Borders
- 15-06. Harvard Graduate School of Design (HGSD)
- 15-07. Harvard Travellers Club (HTC)
- 15-08. Historic New England (HNE)
- 15-09. Historical Society of Cheshire County (HSCC)
- 15-10. Hundred Nights Shelter
- 15-11. Internet Archive
- 15-12. Jaffrey Center Village Improvement Society (JCVIS)
- 15-13. Jaffrey Civic Center (JCC)
- 15-14. Jaffrey Historical Society (JHS)
- 15-15. Monadnock Conservancy
- 15-16. Monadnock United Way
- 15-17. New Hampshire Charitable Foundation (NHCF)
- 15-18. New Hampshire Historical Society (NHS)
- 15-19. New Hampshire Preservation Alliance (NHPA)
- 15-20. The Ohio State University (OSU)
- 15-21. The Osher Map Library and Smith Center for Cartographic Education
- 15-22. The Park Theatre
- 15-23. Shelter from the Storm
- 15-24. The Trustees of Trust Funds—Town of Jaffrey
- 15-25. University of New Hampshire—E. Ruth Buxton Stephenson Memorial Fund
- 15-26. Wikipedia

**16) TIAA-CREF**

- 1. Questions for TIAA-CREF. *16-01*

**17) ADVISOR TO THE EXECUTOR**

- 1. Agreement *17-01*
- 2. Instructions *17-02*

**18) Digital & Antarcticana Advisors**

- 1. Digital Advisor. Sean Driscoll. *18-01*
  - Agreement *18-01.1*
  - Instructions *18-01.2*
- 2. Antarcticana Advisor. Greg Glade. *18-02*
  - Agreement *18-02.1*
  - Instructions *18-02.2*

**19) New Hampshire Charitable Foundation (NHCF)**

- 1. Terra Nova Trust. *19-01*
- 2. Robert B. Stephenson Trust

20) VACANT

21) VACANT

**22) Loring Wolcott & Coolidge**

1. Correspondence (not on website, only in the Loose-leaf binder)
  11. LWC to RBS, May 6, 2019, confirming documents look good. 22-11
  10. LWC to RBS, May 3, 2019, re reviewing estate plan documents. 22-10
  9. LWC to RBS, December 8, 1998, with copy of Acknowledgement of Receipt of Notice of Amendment for the RBS Trust. 22-09
  8. RBS to LWC, November 25, 1998, enclosing documents as listed. 22-08
  7. RBS to LWC, January 8, 1998, enclosing copy of 347 Main Street Trust... 22-07
  6. LWC to RBS, December 31, 1997, enclosing original of 347 Main Street Trust and a copy of this letter. 22-06
  5. RBS to LWC, December 19, 1997, enclosing Last Will, Declaration of Trust, 347 Main Street Trust. 22-05
  4. RBS to LWC, December 9, 1997 enclosing tax documents and other matters. 22-04
  3. RBS to LWC, November 24, 1997 enclosing some tax items. 22-03
  2. RBS to LWC, November 20, 1997 enclosing some changes to my Trust document; also some tax documents. 22-02
  1. LWC to RBS, November 14, 1997 with some comments on my estate planning documents. 22-01

**23) Lawyers**

1. Chris Bean (Bean Law Office). 23-01
  1. Bill for \$250 from Bean Law Office. July 16, 1997 23-01.2
  2. RBS to CVB, November 19, 1998, re amendments to RBS Trust. 23-01.1
  3. Bill for \$25 from Bean Law Office. November 30, 1998 23-01.2
2. Dave Tower (Tower & Crocker). 23-02
  1. Bill \$160 from Tower & Crocker. February 28, 2011 23-02.2
  2. Bill for \$500 from Tower & Crocker. May 31, 2011 23-02.2
  3. Letter to DT from RBS (December 7, 2011) 23-02.1
3. Jeff Crocker (Upton & Hatfield). 23-03
  4. Allison Royce to RBS, June 4, 2019, attaching final Advance Directive, General Durable Power of Attorney and Receipt. 23-03.3
  3. Bill for \$587.50, May 31, 2019 23-03.4
  2. Allison Royce to RBS, May 1, 2019, with draft Power of Attorney and Advance Directive. 23-03.2
  1. RBS to JC, April 19, 2019, attaching current General Power of Attorney, Declaration (Health Care) and Durable Power of Attorney. 23-03.1

**• 24) Cournoyer Funeral Home**

1. Application for Single Pay Life Insurance. June 1, 2019. 24-01
2. Agreement of Trust Establishing the Funeral Insurance Trust. May 5, 2011. 24-02
3. Assignment and Beneficiary Designation. June 1, 2019. 24-03
4. Memorial Planning Questionnaire. Undated. 24-04
5. Meeting with Devin McEntee, Cournoyer Funeral Home, March 25, 2019. 24-05
6. Agreement with Cournoyer Funeral Home. May 3, 2019. 24-06

• 25) **Bank Accounts**

1. TD Bank personal checking account in name of the Robert B. Stephenson Trust 12/19/97. *25-01*
2. TD Bank Antarctic Circle checking account in name of the Robert B. Stephenson Trust 12/19/97. *25-02*

26) VACANT

27) VACANT

28) VACANT

29) VACANT

30) VACANT

31) **Miscellaneous**

1. Certificate of Title 2012 Prius and related material. Since sold. *31-01*
2. Certificate of Title 2021 Prius. *31-02*

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**ADDITIONS**

**19) Trust Mentioned in Accounts**

- *Items with the Trusts.docx*

1. Letter from Richard Wendorf, Boston Athenaeum, re John Bromfield Society. November 5, 1997.
- 2. Letter to Elizabeth Kopley, Boston Athenaeum, re book fund, etc. December 27, 2000. 2pp.
3. Letter from Richard Wendorf, Boston Athenaeum, re updating book funds. April 1, 2001. 4pp.
- 4. Material re intended bequest of \$100,000 to the University of New Hampshire, July 24, 2013. 3pp.

Historical Society of Cheshire Country

1. Charitable Gift Annuity.
  - Charitable Gift Proposal, December 2, 2020.
  - Final page of Charitable Gift Proposal with signatures.
  - Electronic Transfer Authorization.
2. My Chest of Memories.
  - Summary description. [Yet to come]
  - Photographs of the Chest.
  - Lettering on the Chest.
  - Sample record. This is from a FileMaker Pro file that may be found at: > Estate Plan > FOLDERS CORRESPONDING WITH LOOSE-LEAF BINDER > 21. Historical Society of Cheshire County > My Memory Chest > Chest of Memories.fmp12

Chest of Memories database.  
3. Some Bequests.

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February 1, 2022