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PERSONAL AFFAIRS DOCUMENT

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# Robert James Hartwell

Prepared for Review by Estate Counsel

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|----------------|-----------------------------------------------------------------------------------|
| Date Prepared: | <b>July 21, 2026</b>                                                              |
| Document Type: | Personal Affairs Summary                                                          |
| Prepared With: |  |

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This document is a personal affairs summary and is not a legal will, trust, power of attorney, or any legally binding instrument. It is intended to assist estate counsel and the named executor with practical information. All legal instruments should be obtained through qualified legal counsel.

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| 08 | Your Keepsakes          | <i>Not included in this edition</i> |
| 09 | Your Letters            | <i>Not included in this edition</i> |
| 10 | Notes for Your Attorney | ✓                                   |

## CHAPTER 01 OF 10

**ABOUT YOU****IDENTITY**

|                                         |                       |
|-----------------------------------------|-----------------------|
| <b>FULL LEGAL NAME</b>                  | Robert James Hartwell |
| <b>PREFERRED / NICKNAME</b>             | Bob                   |
| <b>DATE OF BIRTH</b>                    | March 15, 1958        |
| <b>CITY &amp; STATE OF BIRTH</b>        | Springfield, Illinois |
| <b>LAST 4 OF SOCIAL SECURITY NUMBER</b> | -                     |
| <b>GENDER</b>                           | Male                  |
| <b>ETHNICITY / HERITAGE (OPTIONAL)</b>  | Irish-American        |
| <b>RELIGION / FAITH</b>                 | Catholic              |

**CONTACT & ADDRESS****CURRENT HOME ADDRESS**

742 Pinecrest Drive, Santa Fe, NM 87501

|                      |                        |
|----------------------|------------------------|
| <b>PRIMARY PHONE</b> | (505) 555-0147         |
| <b>PRIMARY EMAIL</b> | bob.hartwell@email.com |

**BACKGROUND****EDUCATION**

B.S. Civil Engineering, University of New Mexico, 1980. M.S. Structural Engineering, UNM, 1982.

**CAREER & OCCUPATION**

Civil Engineer. Founded Hartwell & Associates Engineering, Santa Fe, NM in 1990. Retired 2020 after 30 years. Previously with NM Department of Transportation, 1982-1990.

**MILITARY SERVICE**

U.S. Army, 1976-1980. Honorably discharged at rank of Specialist E-4. Served at Fort Bliss, TX.

**HOBBIES & INTERESTS**

Woodworking, fly fishing, amateur astronomy, blues guitar, gardening, New Mexico history.

**YOUR STORY**

Born in Springfield, Illinois on March 15, 1958 — the second of four children of Thomas and Ruth Hartwell. Grew up in a working-class neighborhood and developed a love for building things from my father, who was a carpenter. Attended the University of New Mexico on a partial scholarship, fell in love with the desert, and never left. Met my wife Margaret at a church social in 1983. We married the following year and raised two wonderful children in our Santa Fe home. I am most proud of my family and the 30 years I spent building infrastructure that will serve New Mexico long after I am gone. If I could do it again, I would choose the same life without hesitation.

## CHAPTER 02 OF 10

**YOUR LEGACY****YOUR VALUES & WHAT YOU STOOD FOR**

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**YOUR CORE VALUES**

Integrity, hard work, and family above all else. I believed that a man's word is his bond and that you earn trust through actions, not words. I never compromised on honesty even when it cost me contracts. I believed in leaving things better than I found them.

**FAITH & SPIRITUALITY**

Catholic faith has been the anchor of my life. Sunday Mass, the rosary, and a belief that suffering has meaning — these things carried me through the hard years. I hope my children hold onto their faith even when it is difficult.

**YOUR WORK ETHIC & WHAT YOU WORKED FOR**

I worked to build something lasting — not just a paycheck. The bridges and roads my firm built will serve families in New Mexico for generations. That is what work meant to me: show up, do it right, and take pride in your name on the work.

**LIFE LESSONS & WISDOM**

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**LIFE'S GREATEST LESSONS**

Start saving the moment you get your first paycheck. The years go faster than you think. Tell the people you love that you love them — do not wait for the right moment. Choose your spouse carefully; that decision shapes everything else. Ask for help when you need it. Stubbornness is not strength.

**WHAT HARD TIMES TAUGHT YOU**

In 1997 our company nearly went under. We lost three major contracts in one quarter and I came close to laying off everyone. Those two years taught me more about leadership and resilience than the good years ever did. Hard times reveal character — yours and everyone around you.

**ADVICE ON LOVE & MARRIAGE**

Choose someone who makes you want to be better. Do not confuse excitement for love. Marriage is a decision you make every morning, not just once at the altar. Fight fair. Never go to bed angry if you can help it. Margaret has been my best friend for 42 years and I am more grateful for her now than I was on our wedding day.

**ADVICE ON BEING A PARENT OR GRANDPARENT**

Be present. The soccer games and piano recitals matter more than you think at the time. Apologize to your children when you are wrong — it teaches them more than any lecture. Let them make mistakes. Your job is to make them capable, not comfortable.

**ADVICE ON MONEY & FINANCIAL LIFE**

Live below your means from the start. Invest consistently and do not try to time the market. Pay yourself first. Avoid consumer debt. A paid-off house is worth more than a big investment portfolio with a mortgage hanging over it.

**ADVICE ON FINDING PURPOSE**

Purpose comes from serving something larger than yourself — family, community, craft. Do not wait to

feel motivated. Start working and the meaning will follow. Find something you can be proud of when you are old.

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## **FAMILY TRADITIONS**

### **HOLIDAY & SEASONAL TRADITIONS**

Christmas Eve was always tamales at Grandma Collins' house — a tradition Margaret brought from her family that became ours. Christmas morning: Mass first, then gifts. We always drove to the Plaza on Christmas Eve to see the farolitos. Easter: sunrise service, then breakfast together. Thanksgiving has always been at our house, no matter what.

### **FAMILY RECIPES & FOOD**

Margaret's green chile stew is the dish that means family to me. The recipe is in her handwriting in the blue binder in the kitchen. Sopapillas on New Year's Day. My mother's Irish soda bread at Easter — that recipe is on a card in the recipe box.

### **OTHER BELOVED TRADITIONS**

Every summer: a week at the cabin on Pecos River. No phones, no schedules. Fishing in the morning, cards at night. We started this when RJ and Claire were small and kept it every year even after they had their own families. Sunday dinners whenever the kids are in town.

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## **FAMILY HISTORY & STORIES**

### **WHERE WE COME FROM**

The Hartwells came from County Cork, Ireland in the 1880s, settling first in Chicago and then moving to Springfield. My grandfather Thomas Sr. worked the railroad. On my mother's side, the Murphys were from County Galway. Margaret's family, the Collins, came from northern New Mexico — her great-grandmother was a Spanish land grant descendant from the Santa Fe area.

### **STORIES THAT SHOULD BE REMEMBERED**

My father built our kitchen table by hand in 1955. That table is still in the house and it is where every important family conversation happened. When I was 12, my father took me fishing at Lake Springfield and we did not catch a single thing, but he told me about his father and grandfather for the first time. That afternoon is one of my most treasured memories. When RJ was born, the doctor let me cut the cord — something they barely did in 1985 — and I cried like a child.

### **FAMILY MEDICAL HISTORY**

Paternal grandfather: heart disease, died at 64. Father: Type 2 diabetes diagnosed at 55, managed with medication. My mother lived to 87 with no major illness. Margaret's mother had breast cancer at 68, survived. RJ and Claire should be screened for diabetes and heart disease starting at age 40.

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## **YOUR GREATEST JOYS & LEGACY**

### **WHAT BROUGHT YOU THE MOST JOY**

Watching my children become good people. The day we signed the papers on the Pecos cabin. Every summer at that cabin. The engineering award from UNM in 2008. The morning my granddaughter Sofia was born — holding her in that hospital room was one of the best moments of my life.

### **WHAT YOU ARE MOST PROUD OF**

Building a company from nothing and keeping it honest for 30 years. Watching RJ walk across his graduation stage. Watching Claire deliver her first presentation as a structural engineer — she chose my

field. Paying off the house. Forty-two years of marriage.

**WHAT YOU WANT TO BE REMEMBERED FOR**

I want to be remembered as a man who showed up — for his family, his work, his community, and his faith. Not perfect, but present. I hope my children and grandchildren remember that I loved them fiercely and that I tried, every day, to leave things better than I found them.

**ONE LAST THING**

Take care of each other. That is all. The arguments over money and property and who said what — none of it will matter. What will matter is whether you showed up for each other when it was hard. Be kind to Margaret. Love your children well. And go to the cabin every summer.

## CHAPTER 03 OF 10

**YOUR PEOPLE****SPOUSE / PARTNER**

|                      |                             |
|----------------------|-----------------------------|
| <b>FULL NAME</b>     | Margaret Ann Hartwell       |
| <b>DATE OF BIRTH</b> | June 22, 1961               |
| <b>PHONE</b>         | (505) 555-0148              |
| <b>EMAIL</b>         | margaret.hartwell@email.com |
| <b>RELATIONSHIP</b>  | Wife of 42 years            |

**CHILDREN****1**

|                      |                                                                       |
|----------------------|-----------------------------------------------------------------------|
| <b>FULL NAME</b>     | Robert James Hartwell Jr.                                             |
| <b>DATE OF BIRTH</b> | August 10, 1985                                                       |
| <b>PHONE</b>         | (505) 555-0231                                                        |
| <b>EMAIL</b>         | rj.hartwell@email.com                                                 |
| <b>NOTES</b>         | Lives in Albuquerque, NM. Named as estate executor and financial POA. |

**2**

|                      |                                                                                    |
|----------------------|------------------------------------------------------------------------------------|
| <b>FULL NAME</b>     | Claire Marie Donnelly                                                              |
| <b>DATE OF BIRTH</b> | April 22, 1988                                                                     |
| <b>PHONE</b>         | (720) 555-0312                                                                     |
| <b>EMAIL</b>         | claire.donnelly@email.com                                                          |
| <b>NOTES</b>         | Lives in Denver, CO. Married to Michael Donnelly. Has one daughter, Sofia (age 3). |

**FAMILY DISCLOSURES****ADDITIONAL INFORMATION FOR MY FAMILY**

No estrangements or unusual family circumstances to note. Both children are aware of this document and the location of the original will.

**PARENTS & SIBLINGS****PARENTS**

Thomas Edward Hartwell (father) — deceased 2001. Ruth Ann Hartwell nee Murphy (mother) — deceased 2019. Both buried at Oak Ridge Cemetery, Springfield, IL.

**SIBLINGS**

Thomas Hartwell Jr. (brother) — (217) 555-0411 — Springfield, IL. Mary Hartwell Kowalski (sister) — (312) 555-0522 — Chicago, IL. Patrick Hartwell (brother) — deceased 2015.

**KEY ADVISORS & PROFESSIONALS****ATTORNEY - NAME & FIRM** James R. Trujillo, Esq. — Trujillo & Associates Law**ATTORNEY - PHONE** (505) 555-0201**ATTORNEY - ADDRESS**

123 Palace Avenue, Suite 400, Santa Fe, NM 87501

**PRIMARY PHYSICIAN** Dr. Patricia Sanchez — Santa Fe Family Medicine**PHYSICIAN PHONE** (505) 555-0225**FINANCIAL ADVISOR - NAME & FIRM** David Chen — Mesa Financial Group**FINANCIAL ADVISOR - PHONE** (505) 555-0190**FINANCIAL ADVISOR - EMAIL** dchen@mesafinancial.com**FINANCIAL ADVISOR - ADDRESS**

456 St. Francis Drive, Suite 200, Santa Fe, NM 87501

**ESTATE EXECUTOR - NAME** Robert James Hartwell Jr.**ESTATE EXECUTOR - PHONE** (505) 555-0231**ESTATE EXECUTOR - EMAIL** rj.hartwell@email.com**ESTATE EXECUTOR - ADDRESS**

891 Rio Grande Blvd NW, Albuquerque, NM 87104

**ALTERNATE EXECUTOR - NAME** Claire Marie Donnelly**ALTERNATE EXECUTOR - PHONE** (720) 555-0312**GUARDIAN FOR MINOR CHILDREN (NAMED IN WILL)** N/A — children are adults**ACCOUNTANT / CPA - NAME & FIRM** Susan Morales CPA — Morales Tax & Accounting**ACCOUNTANT / CPA - PHONE** (505) 555-0250**ACCOUNTANT / CPA - EMAIL** susan@moralescpa.com**INSURANCE AGENT - NAME & AGENCY** Tom Bradley — State Farm, Santa Fe**INSURANCE AGENT - PHONE** (505) 555-0270**DOCUMENT CO-KEEPER - FULL NAME** James R. Trujillo**DOCUMENT CO-KEEPER - PHONE** (505) 555-0201**DOCUMENT CO-KEEPER - EMAIL** jtrujillo@trujillolaw.com**DOCUMENT CO-KEEPER - RELATIONSHIP** Estate Attorney**CLOSE FRIENDS & OTHERS****CLOSE FRIENDS TO NOTIFY**

Frank and Linda Ortega — (505) 555-0381 — Friends since 1985, close family friends. Dave Kowalski — (505) 555-0392 — Fishing and woodworking companion, 20+ years.

**OTHER IMPORTANT CONTACTS**

Fr. Michael Sandoval — Cathedral Basilica of St. Francis — (505) 555-0410. Dr. Sandra Wells — Cardiologist — (505) 555-0228.

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**EMPLOYER**

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|                                |                                                      |
|--------------------------------|------------------------------------------------------|
| <b>EMPLOYER / COMPANY NAME</b> | Retired — formerly Hartwell & Associates Engineering |
|--------------------------------|------------------------------------------------------|

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|                                            |                                               |
|--------------------------------------------|-----------------------------------------------|
| <b>HR OR SUPERVISOR - NAME &amp; PHONE</b> | N/A — company dissolved at retirement in 2020 |
|--------------------------------------------|-----------------------------------------------|

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**EMPLOYMENT NOTES**

Company formally dissolved December 2020. All pension obligations settled. No outstanding employee matters.

## CHAPTER 04 OF 10

**YOUR MONEY****BANK ACCOUNTS****1**

|                            |                                        |
|----------------------------|----------------------------------------|
| <b>BANK / CREDIT UNION</b> | First National Bank of New Mexico      |
| <b>ACCOUNT TYPE</b>        | Checking                               |
| <b>LAST 4 OF ACCOUNT #</b> | 4421                                   |
| <b>BRANCH / NOTES</b>      | Downtown Santa Fe — 150 Washington Ave |

**2**

|                            |                                        |
|----------------------------|----------------------------------------|
| <b>BANK / CREDIT UNION</b> | First National Bank of New Mexico      |
| <b>ACCOUNT TYPE</b>        | Savings                                |
| <b>LAST 4 OF ACCOUNT #</b> | 8832                                   |
| <b>BRANCH / NOTES</b>      | Downtown Santa Fe — 150 Washington Ave |

**3**

|                            |                               |
|----------------------------|-------------------------------|
| <b>BANK / CREDIT UNION</b> | Desert Credit Union           |
| <b>ACCOUNT TYPE</b>        | Savings                       |
| <b>LAST 4 OF ACCOUNT #</b> | 2209                          |
| <b>BRANCH / NOTES</b>      | Online account — desertcu.com |

**INVESTMENTS & RETIREMENT****INVESTMENT / BROKERAGE ACCOUNTS**

Vanguard brokerage account (acct ending 7731). Approximately \$340,000 in index funds. Statements mailed quarterly to home address. Login in 1Password.

**401(K) / 403(B)**

Hartwell & Associates 401(k) rolled over to Vanguard Traditional IRA at retirement in 2020. No active 401(k) — see IRA section.

**IRA ACCOUNTS (TRADITIONAL / ROTH / SEP / SIMPLE)**

Traditional IRA: Vanguard (acct ending 7731), approx. \$520,000. Roth IRA: Vanguard (acct ending 9912), approx. \$88,000. Primary beneficiary on both: Margaret Ann Hartwell. Contingent: RJ and Claire equally (50/50).

**PENSION**

No pension. Former company was self-owned — no external pension plan.

**SOCIAL SECURITY**

Currently receiving Social Security retirement benefits of \$2,340 per month. Margaret may be entitled to survivor benefits. Contact SSA at 1-800-772-1213.

**HEALTH SAVINGS ACCOUNT (HSA)**

No active HSA. Covered by Medicare Parts A and B.

**RETIREMENT ACCOUNT BENEFICIARY DESIGNATIONS**

All retirement accounts: Primary — Margaret Ann Hartwell. Contingent — Robert James Hartwell Jr. and Claire Marie Donnelly, 50/50 split. Last reviewed July 2024. No changes needed.

**INSURANCE POLICIES**

| 1                     |                                                                             |
|-----------------------|-----------------------------------------------------------------------------|
| INSURANCE COMPANY     | Pacific Life                                                                |
| POLICY TYPE           | Life - Term                                                                 |
| POLICY NUMBER         | PLT-4421-2018                                                               |
| DEATH BENEFIT / VALUE | \$500,000                                                                   |
| BENEFICIARIES         | Margaret Ann Hartwell (primary); RJ and Claire Hartwell (contingent, 50/50) |
| AGENT / CONTACT       | Tom Bradley, State Farm — (505) 555-0270                                    |

| 2                     |                                                   |
|-----------------------|---------------------------------------------------|
| INSURANCE COMPANY     | Pacific Life                                      |
| POLICY TYPE           | Life - Whole/Universal                            |
| POLICY NUMBER         | PLW-8891-2002                                     |
| DEATH BENEFIT / VALUE | \$100,000 face value; cash value approx. \$62,000 |
| BENEFICIARIES         | Margaret Ann Hartwell                             |
| AGENT / CONTACT       | Tom Bradley, State Farm — (505) 555-0270          |

| 3                     |                            |
|-----------------------|----------------------------|
| INSURANCE COMPANY     | AARP/UnitedHealthcare      |
| POLICY TYPE           | Other                      |
| POLICY NUMBER         | MCR-2291-A                 |
| DEATH BENEFIT / VALUE | Medicare Supplement Plan G |
| BENEFICIARIES         | N/A                        |
| AGENT / CONTACT       | 1-800-523-5800             |

**DEBTS & OBLIGATIONS**

**1**

|                          |                                                                                             |
|--------------------------|---------------------------------------------------------------------------------------------|
| <b>TYPE</b>              | Mortgage                                                                                    |
| <b>LENDER / ISSUER</b>   | Wells Fargo Home Mortgage                                                                   |
| <b>LAST 4 OF ACCOUNT</b> | 4421                                                                                        |
| <b>MONTHLY PAYMENT</b>   | \$1,847                                                                                     |
| <b>APPROX. BALANCE</b>   | Approx. \$187,000 remaining                                                                 |
| <b>NOTES</b>             | Primary residence — 742 Pinecrest Drive. Auto-pay from First National checking ending 4421. |

**MONEY OWED TO YOU**

Informal loan of \$8,000 made to Patrick Kowalski (nephew) in 2021 for car purchase. No formal agreement. Family may choose to forgive this — I leave that to their judgment.

**OTHER INCOME SOURCES****ONLINE SALES INCOME**

None

**ROYALTIES**

None

**OTHER INCOME**

Social Security: \$2,340 per month. Vanguard investment dividends: approximately \$800 per month (currently reinvested). No other income sources.

**AUTOPAY & RECURRING BILLS****1**

|                           |                                     |
|---------------------------|-------------------------------------|
| <b>SERVICE / BILLER</b>   | Wells Fargo Mortgage                |
| <b>TYPE</b>               | Mortgage / Rent                     |
| <b>DRAWN FROM ACCOUNT</b> | First National checking ending 4421 |
| <b>MONTHLY AMOUNT</b>     | \$1,847                             |
| <b>ACTION AFTER DEATH</b> | Keep active temporarily             |

**2**

|                           |                                     |
|---------------------------|-------------------------------------|
| <b>SERVICE / BILLER</b>   | PNM Electric                        |
| <b>TYPE</b>               | Utilities                           |
| <b>DRAWN FROM ACCOUNT</b> | First National checking ending 4421 |
| <b>MONTHLY AMOUNT</b>     | ~\$140                              |
| <b>ACTION AFTER DEATH</b> | Transfer to spouse / partner        |

**3**

|                           |                                     |
|---------------------------|-------------------------------------|
| <b>SERVICE / BILLER</b>   | New Mexico Gas Company              |
| <b>TYPE</b>               | Utilities                           |
| <b>DRAWN FROM ACCOUNT</b> | First National checking ending 4421 |
| <b>MONTHLY AMOUNT</b>     | ~\$80                               |
| <b>ACTION AFTER DEATH</b> | Transfer to spouse / partner        |

**4**

|                           |                       |
|---------------------------|-----------------------|
| <b>SERVICE / BILLER</b>   | Netflix               |
| <b>TYPE</b>               | Subscription          |
| <b>DRAWN FROM ACCOUNT</b> | Visa card ending 7721 |
| <b>MONTHLY AMOUNT</b>     | \$15.49               |
| <b>ACTION AFTER DEATH</b> | Cancel immediately    |

**5**

|                           |                              |
|---------------------------|------------------------------|
| <b>SERVICE / BILLER</b>   | Amazon Prime                 |
| <b>TYPE</b>               | Subscription                 |
| <b>DRAWN FROM ACCOUNT</b> | Visa card ending 7721        |
| <b>MONTHLY AMOUNT</b>     | \$14.99                      |
| <b>ACTION AFTER DEATH</b> | Transfer to spouse / partner |

**6**

|                           |                       |
|---------------------------|-----------------------|
| <b>SERVICE / BILLER</b>   | Spotify               |
| <b>TYPE</b>               | Subscription          |
| <b>DRAWN FROM ACCOUNT</b> | Visa card ending 7721 |
| <b>MONTHLY AMOUNT</b>     | \$10.99               |
| <b>ACTION AFTER DEATH</b> | Cancel immediately    |

**IMPORTANT DOCUMENTS****WHERE IS YOUR WILL?**

Original signed will in the fireproof safe in the home office closet. Copy held by attorney James R. Trujillo.

**TRUST INFORMATION (IF ANY)**

No trust currently in place. Attorney Trujillo has recommended a revocable living trust to avoid probate on the two properties. Priority item for 2025.

**SAFE DEPOSIT BOX**

First National Bank of New Mexico, Downtown Santa Fe branch. Box #447. Spare key in fireproof safe under the will. Contains: father's pocket watch, Grandmother Collins' ring (duplicate), original stock certificates.

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|                                   |                                    |
|-----------------------------------|------------------------------------|
| <b>BIRTH CERTIFICATE LOCATION</b> | Fireproof safe, home office closet |
|-----------------------------------|------------------------------------|

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|                                      |                                    |
|--------------------------------------|------------------------------------|
| <b>SOCIAL SECURITY CARD LOCATION</b> | Fireproof safe, home office closet |
|--------------------------------------|------------------------------------|

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|                          |                                    |
|--------------------------|------------------------------------|
| <b>PASSPORT LOCATION</b> | Fireproof safe, home office closet |
|--------------------------|------------------------------------|

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|                                                |                                    |
|------------------------------------------------|------------------------------------|
| <b>MARRIAGE / DIVORCE CERTIFICATE LOCATION</b> | Fireproof safe, home office closet |
|------------------------------------------------|------------------------------------|

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**MILITARY DISCHARGE PAPERS (DD-214) LOCATION**

Fireproof safe, home office closet — DD-214. Copy also on file with the VA regional office.

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|                                 |                                                                               |
|---------------------------------|-------------------------------------------------------------------------------|
| <b>MEDICAL RECORDS LOCATION</b> | Santa Fe Family Medicine — Dr. Patricia Sanchez has complete records on file. |
|---------------------------------|-------------------------------------------------------------------------------|

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**MOST RECENT TAX RETURNS LOCATION**

Last 7 years in red binder in home office filing cabinet, top drawer. Digital copies in Dropbox — see Digital Life chapter.

**IMPORTANT CONTRACTS LOCATION**

Former business contracts archived in storage unit (Desert Storage, unit #118). Personal contracts in home office filing cabinet, bottom drawer.

**CREDIT FREEZE STATUS**

Credit freeze active at Experian, Equifax, and TransUnion as of March 2024. PINs written on a card labeled CREDIT in the fireproof safe.

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|                           |                                                                          |
|---------------------------|--------------------------------------------------------------------------|
| <b>TAX PREPARER / CPA</b> | Susan Morales CPA — (505) 555-0250 — has prepared our returns since 2001 |
|---------------------------|--------------------------------------------------------------------------|

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## CHAPTER 05 OF 10

**YOUR PROPERTY****REAL ESTATE****1**

|                           |                                         |
|---------------------------|-----------------------------------------|
| <b>PROPERTY TYPE</b>      | Primary Home                            |
| <b>ADDRESS</b>            | 742 Pinecrest Drive, Santa Fe, NM 87501 |
| <b>PURCHASE YEAR</b>      | 1991                                    |
| <b>WHERE IS THE DEED?</b> | Fireproof safe, home office closet      |
| <b>MORTGAGE LENDER</b>    | Wells Fargo — see Your Money chapter    |

**NOTES**

4 bed / 3 bath, 2,400 sq ft. Adobe construction. Original purchase price \$187,000. Estimated current value \$620,000.

**2**

|                           |                                        |
|---------------------------|----------------------------------------|
| <b>PROPERTY TYPE</b>      | Vacation Home                          |
| <b>ADDRESS</b>            | 1204 Pecos River Road, Pecos, NM 87552 |
| <b>PURCHASE YEAR</b>      | 2005                                   |
| <b>WHERE IS THE DEED?</b> | Fireproof safe, home office closet     |
| <b>MORTGAGE LENDER</b>    | Paid off — no mortgage                 |

**NOTES**

2 bed / 1 bath cabin on the Pecos River. Purchased for \$92,000. Estimated current value \$185,000. Property taxes auto-pay from First National checking.

**VEHICLES****1**

|                               |                                    |
|-------------------------------|------------------------------------|
| <b>YEAR, MAKE &amp; MODEL</b> | 2019 Ford F-150 XLT                |
| <b>VIN (LAST 6)</b>           | XP4421                             |
| <b>WHERE IS THE TITLE?</b>    | Fireproof safe, home office closet |
| <b>LOAN STATUS</b>            | Paid off                           |

**NOTES**

Primary vehicle. Dark blue. Regular maintenance at Desert Auto, (505) 555-0350.

**2**

|                               |                                                                 |
|-------------------------------|-----------------------------------------------------------------|
| <b>YEAR, MAKE &amp; MODEL</b> | 2022 Toyota Camry SE                                            |
| <b>VIN (LAST 6)</b>           | KL8832                                                          |
| <b>WHERE IS THE TITLE?</b>    | Fireproof safe, home office closet                              |
| <b>LOAN STATUS</b>            | Paid off                                                        |
| <b>NOTES</b>                  | Margaret's vehicle. Pearl white. Maintained at Toyota Santa Fe. |

**HOME ACCESS & SECURITY****SPARE KEY LOCATION**

Spare house key with neighbors Frank and Linda Ortega at 740 Pinecrest Drive. Spare cabin key in junk drawer in kitchen.

**SECURITY SYSTEM**

ADT Home Security. Monitoring line: 1-800-238-2727. Account number NM-44219. Disarm code written on card in fireproof safe.

**REGULAR MAINTENANCE PROVIDERS**

Plumber: Mike's Plumbing, (505) 555-0360. HVAC: Desert Air Systems, (505) 555-0370. Landscaper: Juan Medina, (505) 555-0380. Pest control: Orkin Santa Fe, (505) 555-0390. Cabin maintenance: Ray Trujillo (local handyman), (505) 555-0395.

**UTILITIES****1**

|                               |                                    |
|-------------------------------|------------------------------------|
| <b>TYPE</b>                   | Electric                           |
| <b>PROVIDER NAME</b>          | PNM (Public Service Company of NM) |
| <b>ACCOUNT NUMBER</b>         | 4421-8832                          |
| <b>CUSTOMER SERVICE PHONE</b> | (888) 342-5766                     |

**2**

|                               |                        |
|-------------------------------|------------------------|
| <b>TYPE</b>                   | Gas                    |
| <b>PROVIDER NAME</b>          | New Mexico Gas Company |
| <b>ACCOUNT NUMBER</b>         | NM-44219               |
| <b>CUSTOMER SERVICE PHONE</b> | (888) 664-2726         |

**3**

|                               |                                 |
|-------------------------------|---------------------------------|
| <b>TYPE</b>                   | Water / Sewer                   |
| <b>PROVIDER NAME</b>          | City of Santa Fe Water Division |
| <b>ACCOUNT NUMBER</b>         | SF-7721                         |
| <b>CUSTOMER SERVICE PHONE</b> | (505) 955-4200                  |

**4**

|                               |                 |
|-------------------------------|-----------------|
| <b>TYPE</b>                   | Internet        |
| <b>PROVIDER NAME</b>          | Comcast Xfinity |
| <b>ACCOUNT NUMBER</b>         | XF-88321        |
| <b>CUSTOMER SERVICE PHONE</b> | (800) 934-6489  |

**5**

|                               |                  |
|-------------------------------|------------------|
| <b>TYPE</b>                   | Cell Phone       |
| <b>PROVIDER NAME</b>          | Verizon Wireless |
| <b>ACCOUNT NUMBER</b>         | VZ-4421-88       |
| <b>CUSTOMER SERVICE PHONE</b> | (800) 922-0204   |

**FOREIGN & OUT-OF-STATE PROPERTY****PROPERTY IN ANOTHER STATE OR COUNTRY**

None

**STORAGE****STORAGE UNIT(S)**

Desert Storage, 2200 Cerrillos Road, Santa Fe. Unit #118. Access code written on card in fireproof safe. Contains: archived business records (30 years of project files), furniture from Margaret's mother's estate, seasonal items.

**OTHER PROPERTY LOCATIONS**

Woodworking shop in detached garage at primary residence. Contains Delta table saw, Jet bandsaw, various hand tools. See Keepsakes chapter for disposition of tools.

CHAPTER 06 OF 10

YOUR DIGITAL LIFE

EMERGENCY ACCESS

PASSWORD MANAGER

1Password. Master password is written on a card labeled MASTER KEY inside the fireproof safe in the home office closet. Emergency kit printed and also stored in the safe. RJ has been briefed on this procedure.

EMERGENCY ACCESS INSTRUCTIONS

Step 1: Open the fireproof safe (combination written in Final Reveals chapter — handwrite-only). Step 2: Find the card labeled MASTER KEY. Step 3: Download 1Password at 1password.com. Step 4: Sign in with bob.hartwell@email.com and the master password. All other account passwords are stored there.

WISHES FOR SOCIAL MEDIA & ONLINE PRESENCE

Facebook: Please memorialize my account — visit facebook.com/memorialization. LinkedIn: Close and delete the account. Email: RJ has permission to access and archive anything important, then close all accounts after 90 days. Google Photos: Do NOT delete — transfer access to Margaret so she keeps the family photo library.

DEVICE ACCESS

PHONE(S) - MAKE & MODEL iPhone 15 Pro (Space Black)

PHONE PASSCODE HINT

6-digit code. The year I graduated from UNM plus my high school football jersey number.

TABLET - MAKE & MODEL iPad Air, 5th generation (Space Gray)

TABLET PASSCODE HINT Same code as the phone.

COMPUTER(S) - MAKE & MODEL MacBook Pro 14-inch, 2023 (Space Gray)

COMPUTER LOGIN HINT

Login password hint written on a sticky note inside the cover of the brown folder labeled MISC in the home office filing cabinet.

DEVICE ACCESS NOTES

Face ID is set up on iPhone and iPad. If Face ID fails, use the PIN. All devices have Find My enabled under Apple ID bob.hartwell@icloud.com. iCloud backup is on for all devices.

CRYPTOCURRENCY & DIGITAL ASSETS

WHAT YOU HOLD

None

EXCHANGE ACCOUNTS

None

NFTS & OTHER DIGITAL ASSETS

hartwell-associates.com domain — registered through GoDaddy. Expires March 2026. No active website. Kept for sentimental reasons. RJ can let it lapse.

**ACCOUNT DIRECTORY****1**

|                          |                                                |
|--------------------------|------------------------------------------------|
| <b>TYPE</b>              | Email                                          |
| <b>SERVICE / WEBSITE</b> | Gmail                                          |
| <b>USERNAME OR EMAIL</b> | bob.hartwell.1958@gmail.com                    |
| <b>NOTES</b>             | Primary personal email. 2FA enabled on iPhone. |
| <b>PASSWORD</b>          |                                                |

**2**

|                          |                                                           |
|--------------------------|-----------------------------------------------------------|
| <b>TYPE</b>              | Email                                                     |
| <b>SERVICE / WEBSITE</b> | iCloud                                                    |
| <b>USERNAME OR EMAIL</b> | bob.hartwell@icloud.com                                   |
| <b>NOTES</b>             | Apple account. Family photos stored here — do not delete. |
| <b>PASSWORD</b>          |                                                           |

**3**

|                          |                                 |
|--------------------------|---------------------------------|
| <b>TYPE</b>              | Social Media                    |
| <b>SERVICE / WEBSITE</b> | Facebook                        |
| <b>USERNAME OR EMAIL</b> | bob.hartwell.1958               |
| <b>NOTES</b>             | Please memorialize after death. |
| <b>PASSWORD</b>          |                                 |

**4**

|                          |                                      |
|--------------------------|--------------------------------------|
| <b>TYPE</b>              | Banking                              |
| <b>SERVICE / WEBSITE</b> | First National Bank of NM Online     |
| <b>USERNAME OR EMAIL</b> | bhartwell58                          |
| <b>NOTES</b>             | Online banking access. 2FA on phone. |
| <b>PASSWORD</b>          |                                      |

**5**

|                          |                                                              |
|--------------------------|--------------------------------------------------------------|
| <b>TYPE</b>              | Investment / Brokerage                                       |
| <b>SERVICE / WEBSITE</b> | Vanguard                                                     |
| <b>USERNAME OR EMAIL</b> | bhartwell_inv                                                |
| <b>NOTES</b>             | Investment and IRA accounts. Statements also mailed to home. |
| <b>PASSWORD</b>          |                                                              |

**6**

|                          |                                                  |
|--------------------------|--------------------------------------------------|
| <b>TYPE</b>              | Shopping                                         |
| <b>SERVICE / WEBSITE</b> | Amazon                                           |
| <b>USERNAME OR EMAIL</b> | bob.hartwell@email.com                           |
| <b>NOTES</b>             | Transfer Prime membership to Margaret or cancel. |
| <b>PASSWORD</b>          |                                                  |

**7**

|                          |                        |
|--------------------------|------------------------|
| <b>TYPE</b>              | Subscription           |
| <b>SERVICE / WEBSITE</b> | Netflix                |
| <b>USERNAME OR EMAIL</b> | bob.hartwell@email.com |
| <b>NOTES</b>             | Cancel immediately.    |
| <b>PASSWORD</b>          |                        |

**8**

|                          |                        |
|--------------------------|------------------------|
| <b>TYPE</b>              | Subscription           |
| <b>SERVICE / WEBSITE</b> | Spotify                |
| <b>USERNAME OR EMAIL</b> | bob.hartwell@email.com |
| <b>NOTES</b>             | Cancel immediately.    |
| <b>PASSWORD</b>          |                        |

**9**

|                          |                                                                  |
|--------------------------|------------------------------------------------------------------|
| <b>TYPE</b>              | Domain / Website                                                 |
| <b>SERVICE / WEBSITE</b> | GoDaddy                                                          |
| <b>USERNAME OR EMAIL</b> | bhartwell58                                                      |
| <b>NOTES</b>             | hartwell-associates.com domain. Can lapse at renewal March 2026. |
| <b>PASSWORD</b>          |                                                                  |

## CHAPTER 07 OF 10

**YOUR WISHES****AFTER PASSING**

**PRE-ARRANGED FUNERAL?** No - see my wishes below

**FUNERAL HOME NAME & CONTACT**

Strong-Thorne Mortuary, 1100 Coal Ave SE, Albuquerque, NM 87106. Phone: (505) 842-8800. I have spoken with them informally but made no formal arrangements.

**BURIAL OR CREMATION?** Burial

**DETAILS**

I am a veteran and wish to be buried at Santa Fe National Cemetery, 501 N. Guadalupe St, Santa Fe, NM 87501. Contact the National Cemetery Scheduling Office at 1-800-535-1117. Request military burial honors — I am entitled to them as a veteran.

**ORGAN DONATION** Yes - donor

**BODY DONATION TO SCIENCE** No

**GUARDIAN FOR MINOR CHILDREN**

N/A — children are adults

**MEMORIAL SERVICE**

**TYPE OF SERVICE** Celebration of life

**WHERE TO HOLD IT**

Cathedral Basilica of St. Francis of Assisi, 131 Cathedral Place, Santa Fe, NM 87501. Reception afterward at our home at 742 Pinecrest Drive.

**MUSIC REQUESTS**

Ave Maria (Schubert). Amazing Grace (traditional). La Llorona — Margaret knows the recording I love. Something from John Denver if Fr. Sandoval allows it.

**READINGS OR PRAYERS**

Psalm 23. John 14:1-6. A reading from the writings of St. Francis at Fr. Sandoval's discretion.

**WHO SHOULD SPEAK**

Fr. Michael Sandoval to officiate. RJ and Claire may speak if they wish — no pressure. Frank Ortega, if he is willing.

**OTHER SERVICE REQUESTS**

No open casket. Flowers are welcome but a donation to the Wounded Warrior Project in lieu of flowers is preferred. Please serve good New Mexico food at the reception — not just crackers and cheese. Play my blues records.

**MEDICAL DIRECTIVES**

**ADVANCE DIRECTIVE / LIVING WILL** Yes - I have one

**WHERE IS IT STORED?**

Signed original in fireproof safe, home office closet. Copies on file with Dr. Patricia Sanchez (Santa Fe

Family Medicine) and at Presbyterian Santa Fe Medical Center.

**HEALTHCARE PROXY / POA**

Margaret Ann Hartwell (primary). Robert James Hartwell Jr. (alternate if Margaret is unable).

**MEDICAL WISHES**

I do not wish to be kept alive on life support if there is no reasonable expectation of meaningful recovery. Comfort and palliative care are always appropriate. No extraordinary measures if I am in a persistent vegetative state. I have discussed this with Margaret and RJ in person.

**CHARITABLE REQUESTS**

|                                                          |                                                                                |
|----------------------------------------------------------|--------------------------------------------------------------------------------|
| 1                                                        |                                                                                |
| ORGANIZATION NAME                                        | Wounded Warrior Project                                                        |
| ADDRESS / WEBSITE                                        | woundedwarriorproject.org — 4899 Belfort Rd, Suite 300, Jacksonville, FL 32256 |
| GIFT TYPE                                                | Specific dollar amount                                                         |
| AMOUNT OR DESCRIPTION                                    | \$5,000                                                                        |
| PURPOSE / DESIGNATION                                    |                                                                                |
| General fund supporting veterans' mental health programs |                                                                                |

  

|                               |                                             |
|-------------------------------|---------------------------------------------|
| 2                             |                                             |
| ORGANIZATION NAME             | Cathedral Basilica of St. Francis of Assisi |
| ADDRESS / WEBSITE             | 131 Cathedral Place, Santa Fe, NM 87501     |
| GIFT TYPE                     | Specific dollar amount                      |
| AMOUNT OR DESCRIPTION         | \$2,500                                     |
| PURPOSE / DESIGNATION         |                                             |
| Building and restoration fund |                                             |

**CHARITABLE GIVING NOTES**

These amounts are stated in my will. Executor should verify the will for the binding language and coordinate with attorney Trujillo.

**FINAL REQUESTS****OBITUARY NOTES**

Robert James Hartwell, 67, of Santa Fe, NM. Born March 15, 1958 in Springfield, IL. Retired civil engineer and founder of Hartwell & Associates Engineering. U.S. Army veteran. Beloved husband of Margaret for 42 years, father of RJ and Claire, grandfather of Sofia. Please keep it simple and honest — no flowery language.

**FLOWERS OR CHARITY?**

Donation to Wounded Warrior Project preferred in lieu of flowers. Flowers from immediate family are of course welcome.

**OTHER FINAL WISHES**

Play my old blues records at the reception. People should eat, laugh, and tell stories. I have had a full

and good life — I want my memorial to feel like that.

## CHAPTER 10 OF 10

**NOTES FOR YOUR ATTORNEY****LEGAL DOCUMENTS**

**WILL STATUS** Current and signed

**WILL LOCATION**

Original signed will in the fireproof safe in home office closet at 742 Pinecrest Drive. Copy held by attorney James R. Trujillo, Trujillo & Associates Law, 123 Palace Avenue Suite 400, Santa Fe, NM 87501.

**TRUST STATUS** No trust

**TRUST DETAILS**

No trust currently in place. Attorney Trujillo has recommended creating a revocable living trust to avoid probate on the primary residence and vacation property. This is a priority item before end of 2025.

**POWER OF ATTORNEY - FINANCIAL (AGENT NAME)** Margaret Ann Hartwell (primary). Robert James Hartwell Jr. (alternate).

**FINANCIAL POA DOCUMENT - LOCATION** Fireproof safe, home office closet

**POWER OF ATTORNEY - HEALTHCARE (AGENT NAME)**

Margaret Ann Hartwell (primary). Robert James Hartwell Jr. (alternate if Margaret is unable).

**HEALTHCARE POA DOCUMENT - LOCATION** Fireproof safe, home office closet

**ADVANCE MEDICAL DIRECTIVE / LIVING WILL - LOCATION**

Signed advance directive in fireproof safe. Copies on file with Dr. Patricia Sanchez (Santa Fe Family Medicine) and Presbyterian Santa Fe Medical Center. Attorney Trujillo also holds a copy.

**BENEFICIARY REVIEW NOTES**

All beneficiary designations reviewed July 2024. Retirement accounts: Margaret as primary, RJ and Claire (50/50) as contingent. Life insurance: same structure. No changes needed at this time.

**DIGITAL ASSET PLAN**

No cryptocurrency or significant digital assets. hartwell-associates.com domain may be allowed to expire March 2026. RJ has been designated to handle all digital accounts and closures — see Digital Life chapter.

**BUSINESS & OTHER INTERESTS****BUSINESS OWNERSHIP**

Hartwell & Associates Engineering formally dissolved December 2020 after 30 years of operation. All assets distributed, all liabilities settled. No remaining business interests or ongoing obligations.

**PARTNERSHIPS & LLCs**

No active partnerships or LLC memberships.

**INTELLECTUAL PROPERTY**

No patents, trademarks, or copyrights. Thirty years of engineering drawings and project records archived in storage unit — these belong to clients and should be offered to them or donated to NMDOT archives.

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**QUESTIONS & CONCERNS****QUESTIONS FOR MY ATTORNEY**

1. Should we move forward with a revocable living trust to avoid probate on the two properties? 2. Is the current beneficiary structure on retirement accounts optimal for Margaret's tax situation as a surviving spouse? 3. Should the vacation cabin be titled differently to simplify transfer to the children? 4. Confirm that the charitable bequest amounts are properly documented in the current will.

**ESTATE CONCERNS**

Primary concern: I want Margaret to be able to stay in the house as long as she wants without financial pressure. The mortgage balance is approximately \$187,000 — life insurance proceeds should be more than sufficient to pay it off completely. Please ensure RJ and Claire understand this is the first priority. Secondary concern: the vacation cabin. Both children love it. I do not want it sold unless Margaret needs the funds. Consider titling it so it passes outside of probate directly to them.

**FINAL NOTES**

James — thank you for 20 years of sound advice. Make sure Margaret understands the time-sensitive elections required after my death (spousal IRA rollover, Social Security survivor benefits, etc.). She will be overwhelmed. Make the process as simple for her as possible.



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