



PERSONAL AFFAIRS DOCUMENT

Robert James Hartwell

The letters you leave behind.

July 21, 2026

Personal & Confidential * For Family and Loved Ones

CHAPTER 01 OF 10

About You

IDENTITY

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

CONTACT & ADDRESS

CURRENT HOME ADDRESS

742 Pinecrest Drive, Santa Fe, NM 87501

PRIMARY PHONE	(505) 555-0147
PRIMARY EMAIL	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

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

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.

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.

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.

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

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

CHILDREN

1

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

2

FULL NAME	Claire Marie Donnelly
DATE OF BIRTH	April 22, 1988
PHONE	(720) 555-0312
EMAIL	claire.donnelly@email.com
NOTES	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
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ATTORNEY - PHONE	(505) 555-0201
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ATTORNEY - ADDRESS

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

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

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

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

891 Rio Grande Blvd NW, Albuquerque, NM 87104

ALTERNATE EXECUTOR - NAME	Claire Marie Donnelly
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ALTERNATE EXECUTOR - PHONE	(720) 555-0312
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GUARDIAN FOR MINOR CHILDREN (NAMED IN WILL)	N/A — children are adults
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ACCOUNTANT / CPA - NAME & FIRM	Susan Morales CPA — Morales Tax & Accounting
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ACCOUNTANT / CPA - PHONE	(505) 555-0250
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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.

EMPLOYER

EMPLOYER / COMPANY NAME	Retired — formerly Hartwell & Associates Engineering
HR OR SUPERVISOR - NAME & PHONE	N/A — company dissolved at retirement in 2020

EMPLOYMENT NOTES

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

CHAPTER 04 OF 10

Your Money

BANK ACCOUNTS

1

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

2

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

3

BANK / CREDIT UNION	Desert Credit Union
ACCOUNT TYPE	Savings
LAST 4 OF ACCOUNT #	2209
BRANCH / NOTES	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

TYPE	Mortgage
LENDER / ISSUER	Wells Fargo Home Mortgage
LAST 4 OF ACCOUNT	4421
MONTHLY PAYMENT	\$1,847
APPROX. BALANCE	Approx. \$187,000 remaining
NOTES	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**

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

2

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

3

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

4

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

5

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

6

SERVICE / BILLER	Spotify
TYPE	Subscription
DRAWN FROM ACCOUNT	Visa card ending 7721
MONTHLY AMOUNT	\$10.99
ACTION AFTER DEATH	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.

BIRTH CERTIFICATE LOCATION	Fireproof safe, home office closet
SOCIAL SECURITY CARD LOCATION	Fireproof safe, home office closet
PASSPORT LOCATION	Fireproof safe, home office closet
MARRIAGE / DIVORCE CERTIFICATE LOCATION	Fireproof safe, home office closet

MILITARY DISCHARGE PAPERS (DD-214) LOCATION

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

MEDICAL RECORDS LOCATION	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.

TAX PREPARER / CPA

Susan Morales CPA — (505) 555-0250 — has prepared our returns since 2001

CHAPTER 05 OF 10

Your Property

REAL ESTATE

1

PROPERTY TYPE	Primary Home
ADDRESS	742 Pinecrest Drive, Santa Fe, NM 87501
PURCHASE YEAR	1991
WHERE IS THE DEED?	Fireproof safe, home office closet
MORTGAGE LENDER	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

PROPERTY TYPE	Vacation Home
ADDRESS	1204 Pecos River Road, Pecos, NM 87552
PURCHASE YEAR	2005
WHERE IS THE DEED?	Fireproof safe, home office closet
MORTGAGE LENDER	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

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

NOTES

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

2

YEAR, MAKE & MODEL	2022 Toyota Camry SE
VIN (LAST 6)	KL8832
WHERE IS THE TITLE?	Fireproof safe, home office closet
LOAN STATUS	Paid off

NOTES

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

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

2

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

3

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

4

TYPE	Internet
PROVIDER NAME	Comcast Xfinity
ACCOUNT NUMBER	XF-88321
CUSTOMER SERVICE PHONE	(800) 934-6489

5

TYPE	Cell Phone
PROVIDER NAME	Verizon Wireless
ACCOUNT NUMBER	VZ-4421-88
CUSTOMER SERVICE PHONE	(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**

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

2

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

3

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

4

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

5

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

6

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

7

TYPE	Subscription
SERVICE / WEBSITE	Netflix
USERNAME OR EMAIL	bob.hartwell@email.com
NOTES	Cancel immediately.
PASSWORD	

8

TYPE	Subscription
SERVICE / WEBSITE	Spotify
USERNAME OR EMAIL	bob.hartwell@email.com
NOTES	Cancel immediately.
PASSWORD	

9

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

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 08 OF 10

Your Keepsakes

VALUABLES INVENTORY

1

ITEM NAME / DESCRIPTION	1962 Gibson ES-335 Guitar
CATEGORY	Guitar / Musical Instrument
ESTIMATED VALUE	\$4,500
WHERE IS IT STORED?	Living room, in hard case behind the couch
WHO SHOULD RECEIVE THIS?	Robert James Hartwell Jr. (RJ)

SPECIAL INSTRUCTIONS

This guitar belonged to my father. Play it, RJ — do not let it sit in a case.



2

ITEM NAME / DESCRIPTION	Grandmother Collins Diamond Engagement Ring
CATEGORY	Jewelry
ESTIMATED VALUE	\$2,200 (appraised 2019)
WHERE IS IT STORED?	Margaret's jewelry box, master bedroom
WHO SHOULD RECEIVE THIS?	Claire Marie Donnelly

SPECIAL INSTRUCTIONS

This was Margaret's grandmother's ring. We always intended it to go to Claire.



3

ITEM NAME / DESCRIPTION	1955 Lincoln Penny Collection
CATEGORY	Coin / Stamp Collection
ESTIMATED VALUE	\$800 estimated (have a coin dealer appraise before selling)
WHERE IS IT STORED?	Wooden box on top shelf of home office
WHO SHOULD RECEIVE THIS?	Robert James Hartwell Jr. (RJ)

SPECIAL INSTRUCTIONS

My father started this collection. There is a 1955 doubled-die penny that may be valuable — have it appraised before any sale.



4

ITEM NAME / DESCRIPTION	Hand-Built Walnut Kitchen Table
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CATEGORY	Antique / Furniture
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ESTIMATED VALUE	\$600 estimated
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WHERE IS IT STORED?	Kitchen
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WHO SHOULD RECEIVE THIS?

Stays in the family home while Margaret lives there. After that, RJ and Claire decide together.

SPECIAL INSTRUCTIONS

I built this table in 2003. It has a small burn mark on one corner from a candle at Christmas 2010. Do not try to fix it — that mark is part of the story.

**SENTIMENTAL ITEMS & GENERAL DISTRIBUTION****JEWELRY TO SPECIFIC PEOPLE**

All of Margaret's jewelry is hers to keep and distribute as she sees fit. Grandmother Collins' ring goes to Claire as noted above. My father's gold pocket watch (in the safe deposit box) goes to RJ.

PHOTO ALBUMS & FAMILY PHOTOS

Physical photo albums are in the hall closet, in chronological order from 1984 onward. Margaret keeps what she wants. Remaining albums to be divided between RJ and Claire. Digital photos are in Google Photos (iCloud backup also) — do not delete.

FAMILY HEIRLOOMS

Father's pocket watch — to RJ. Grandmother Collins' ring — to Claire. Kitchen table — to stay with family. Mother's Irish soda bread recipe card — to Claire, who bakes.

FURNITURE & HOME ITEMS

Margaret keeps all furniture as long as she wishes. After that, RJ and Claire choose what they want before any remainder is sold or donated. I have no strong preferences beyond the kitchen table.

BOOKS, COLLECTIONS, HOBBIES

Woodworking library (approximately 80 books) — offer to Santa Fe Community College woodworking program first, then donate remainder. New Mexico history collection — RJ can take what he wants; donate rest to the New Mexico History Museum.

GENERAL DISTRIBUTION NOTES

Margaret receives everything as primary beneficiary. After Margaret, equal division between RJ and Claire. If they cannot agree on an item, sell it and split the proceeds. Do not let anything I own cause a rift between them.

PETS

1

PET'S NAME	Bruno
SPECIES / TYPE	Dog
BREED	Golden Retriever
AGE	6 years
COLOR / MARKINGS	Golden / cream

WHO SHOULD CARE FOR THEM

Margaret Hartwell (primary). If Margaret cannot care for him, Frank and Linda Ortega at 740 Pinecrest Drive have agreed to take him.

VETERINARIAN & CLINIC	Dr. Maria Rodriguez — Santa Fe Animal Hospital
VET PHONE NUMBER	(505) 555-0300

MEDICAL NEEDS / MEDICATIONS

Hip dysplasia diagnosed 2023. Takes Carprofen 25mg twice daily with food. Annual checkup scheduled each April.

CARE INSTRUCTIONS

2 cups Purina Pro Plan (chicken and rice formula) twice daily — 7am and 5pm. Walks twice daily. Stays in the backyard but must be on leash outside the property. Hates thunderstorms and firecrackers.

FUNDS SET ASIDE

\$3,000 set aside in Desert Credit Union savings account ending 2209 specifically for Bruno's care.

ADDITIONAL NOTES

Bruno is a gentle, loving dog who is deeply attached to Margaret. Whoever takes him should know he will grieve and needs extra patience and attention in the first weeks.

CHAPTER 09 OF 10

Your Letters

Words that outlast us all.

The most personal part of this document — written directly to the people you love most.

A LETTER FROM ROBERT JAMES HARTWELL

To Your Spouse or Partner

(505) 555-0148 * margaret.hartwell@email.com

FULL NAME	Margaret Ann Hartwell
PHONE	(505) 555-0148
EMAIL	margaret.hartwell@email.com

My dear Maggie, If you are reading this, then I have gone ahead of you — which was always my plan, because I could not bear the thought of you going first. Forty-two years. I have been trying to count up everything we have done together and I cannot find a number big enough. You were the best decision I ever made. You are the reason our children are good people. You are the reason our home felt like a home. I know you will be okay. You have always been stronger than you let on. Let RJ and Claire help you — that is what they are for and they want to. Take the trip to Ireland you always talked about. Keep Sunday dinner going if it brings you joy. Please do not let anyone rush you through this. I love you more at the end than I did at the beginning, which I did not think was possible. Wait for me. All my love, Bob

A LETTER FROM ROBERT JAMES HARTWELL

To Children

1

FULL NAME Robert James Hartwell Jr.

PHONE (505) 555-0231

EMAIL rj.hartwell@email.com

LETTER

RJ, Of all the things I have built in my life, you are what I am most proud of. I know we butted heads when you were young. You were stubborn and so was I, and we are too much alike for that to have gone any other way. But watching you grow into the man you are — the father you are to Sofia — has been one of the great honors of my life. Take care of your mother. Take care of your sister. And take care of yourself — do not wait until you are old to slow down and enjoy what you have built. I love you, son. I always have. Dad

2

FULL NAME	Claire Marie Donnelly
PHONE	(720) 555-0312
EMAIL	claire.donnelly@email.com

LETTER

My Claire, When you told me you were going to be a structural engineer, I cried. You probably thought it was because I was proud. I was — but also because you chose my world, and that meant more to me than I ever told you. You are the most capable person I know. You got that from your mother, and the stubbornness from me. Use both well. Kiss Sofia every day. She will grow up faster than you think. Take the cabin every summer — keep that going for her the way we kept it going for you. I love you with everything I have. Dad

A LETTER FROM ROBERT JAMES HARTWELL

To the Whole Family

To everyone I love, I have had a full life and I am grateful for every year of it — the hard ones included, because they made the good ones mean something. If there is one thing I want you to take from knowing me, it is this: show up. Show up for the people you love. Show up when it is inconvenient and when you are tired and when you do not know what to say. Just being there is usually enough. Take care of each other. That is all. With all my love, Bob

A LETTER FROM ROBERT JAMES HARTWELL

To Friends & Others

1

RECIPIENT FULL NAME	Frank Ortega
YOUR RELATIONSHIP	Best friend of 38 years
PHONE	(505) 555-0381
EMAIL	fortega@email.com
LAST KNOWN LOCATION	Santa Fe, NM

LETTER

Frank, Thirty-eight years of fishing trips and you still cannot cast a fly rod worth a damn. I say that with complete affection. Thank you for being the kind of friend a man can go years without seeing and pick right back up with. Thank you for the time you helped me move my mother's things. Thank you for just being there. Take Linda somewhere nice. Tell her I said so. Your friend, Bob

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.

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.

PRIVATE APPENDIX

Final Reveals

For your eyes only — until you choose otherwise.

□ **Fill in by hand, after printing.** This section is intentionally blank in all digital copies of your document. These fields are never stored online or transmitted to any server — by design. Print this page, then fill in your answers with a pen.

ACCESS & COMBINATIONS

SAFE COMBINATION / LOCATION

HIDDEN CASH OR VALUABLES

LOCKBOXES OR HIDDEN CONTAINERS

IMPORTANT KEY LOCATIONS

THINGS PEOPLE DON'T KNOW**UNKNOWN ACCOUNTS OR ASSETS****SURPRISES OR FINAL GIFTS****YOUR FINAL WORDS (PRIVATE)****PASSWORD HINTS****PASSWORD HINTS & MASTER KEY LOCATION**



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The letters you leave behind.

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Date	Time Spent	Chapters Visited	Prepared by
Jul 21, 2026 10:29 pm	In progress	-	Thomas
Jul 21, 2026 4:42 pm	2 hr 14 min	-	Self
Jul 20, 2026 7:35 pm	20 hr 26 min	Your Property, Your Digital Life, Your Keepsakes, Your Letters, Notes for Your Attorney	Tom
Jul 20, 2026 4:38 pm	2 hr 57 min	Your Legacy, Your People, Your Property, Your Keepsakes, Your Letters	Self
Jul 20, 2026 3:22 pm	1 hr 16 min	-	self

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