

LETTER OF INSTRUCTION

Robert James Hartwell

A personal guide for my family and whoever handles my affairs.

Date Prepared **July 21, 2026**

This document is not a legal will, trust, or power of attorney. It is a personal guide to help my family navigate practical matters after my death. It does not create legal obligations or supersede any legal instruments I have signed. Please contact my attorney for legal documents.

First Things to Do

Share this document with the person handling your affairs as soon as possible.

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

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.

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).

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

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.

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	
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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 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 / 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.

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 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 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.

About Me

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
CURRENT HOME ADDRESS	742 Pinecrest Drive, Santa Fe, NM 87501
PRIMARY PHONE	(505) 555-0147
PRIMARY EMAIL	bob.hartwell@email.com

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.

Important People to Notify

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

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.

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

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deceased 2019. Both buried at Oak Ridge Cemetery, Springfield, IL.

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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

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(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

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(505) 555-0392 — Fishing and woodworking companion, 20+ years.

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

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.

Financial Accounts

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

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

BANK / CREDIT UNION Desert Credit Union

ACCOUNT TYPE Savings

LAST 4 OF ACCOUNT # 2209

BRANCH / NOTES Online account — desertcu.com

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 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

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

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

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.

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.

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

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

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

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

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

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

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

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
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Property & Belongings

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

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

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.

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.

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.

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.

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

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

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

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

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

PROPERTY IN ANOTHER STATE OR COUNTRY

None

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.

Digital Accounts

Write each account password on the physical copy after printing. Passwords are never stored digitally - by design.

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.

PHONE(S) - MAKE & MODEL	iPhone 15 Pro (Space Black)
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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)
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TABLET PASSCODE HINT	Same code as the phone.
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COMPUTER(S) - MAKE & MODEL	MacBook Pro 14-inch, 2023 (Space Gray)
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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.

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.

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

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

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

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

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

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

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

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

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

My Final Wishes

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

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.

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.

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

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.

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.

Sentimental Items

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.

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.

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.

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.

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.

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.

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.



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