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INSTRUCTIONS FOR
DISPOSITION OF TANGIBLE
PERSONAL PROPERTY BY MEMORANDUM

Under Pennsylvania law, you may use a memorandum to dispose of tangible personal property. If you wish to use a memorandum, you should know and follow these instructions:

1. To ensure that your memorandum is effective, your Will should permit you to leave a memorandum and the memorandum should refer to your Will.
2. The memorandum should not include items already specifically mentioned in your Will.
3. The memorandum should not be used to give money, notes, real estate, deeds, securities, other documents of title, or property used in a trade or business.
4. You should date and sign the memorandum. If you list items on more than one page, date and sign each page. Your signature need not be witnessed.
5. You should clearly describe each item so that it can be easily identified and not be confused with another similar item.
6. Each recipient should be identified by his or her proper name and relationship to you, if any. If possible, the address of the recipient should be added if he or she is not closely related to you, so that proper identification is ensured.
7. You may destroy the entire memorandum. Changes must be made by dating and signing a new memorandum. Do not simply mark an existing memorandum.
8. If you execute a new Will, you should sign a new memorandum unless the old memorandum is specifically identified by date and incorporated in your new Will.
9. You should keep the memorandum in a place where it is likely to be found, such as a desk, file, or safe deposit box, but preferably wherever your Will is kept. You should explain the location and purpose of the memorandum to your family or others likely to survive you.

