



SOCIETY OF ANTIQUARISTS THE SUCCESSION PLAN

SERVARE · SCIRE · TRADERE

To preserve · To know · To pass on

A PLANNING DOCUMENT OF THE SOCIETY · SoA 2026.007 · ARTICLE V – PLAN THE SUCCESSION

I, _____, of _____, being the steward of the collection described in the attached inventory, set down this plan so that no object in my care leaves it less documented, less stable, or less understood than it entered, and so that those who come after me know my wishes, and where everything is.

THIS IS A PLANNING DOCUMENT, NOT A LEGAL INSTRUMENT.

It does not by itself constitute a will, codicil, or trust, and it binds no one unless its contents are incorporated into properly executed estate documents under the laws of your jurisdiction. Its purpose is to organize your intentions and information so that your attorney can make them binding, and your family can find them. Share it with both.

I · WHERE THINGS ARE

LOCATION OF THE COLLECTION

LOCATION OF THE OBJECT RECORDS, RECEIPTS, AND PAPERWORK

ATTORNEY – NAME AND CONTACT

TRUSTED DEALER, APPRAISER, OR ADVISOR – NAME AND CONTACT

II · INSTRUCTIONS TO MY EXECUTOR AND FAMILY

Until you have spoken with the contacts named above, please: do not clean, polish, or repair any object; keep every object together with its paperwork, labels, and boxes; do not discard anything that looks like a record, however scrap-like; and do not sell or give away any piece. Undocumented handling in the first weeks does more harm than decades of storage.

FURTHER INSTRUCTIONS IN MY OWN WORDS

III · SIGNED

SIGNATURE & DATE

WITNESS (OPTIONAL)

Witnessing is a formality of care; it does not make this document legally binding.

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INVENTORY

DISPOSITION KEY: SALE WITH RECORDS • GIFT • BEQUEST • INSTITUTION • EXECUTOR'S DISCRETION

Print additional copies of this page for larger collections. Every line should match an Object Record.

INVENTORY PAGE _____ OF _____

NO.	ACC. NO.	OBJECT	INTENDED DISPOSITION	INTENDED RECIPIENT
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

A PLANNING AID ONLY; CONSULT YOUR ATTORNEY TO GIVE THESE WISHES LEGAL EFFECT

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