

Document Locator

The location of your personal documents and information regarding your accounts is important in the event of an emergency and will be of great assistance to your family, trustee and/or executor. Please share this information with them. This form is provided for your convenience in reviewing the locations of various important documents. If we can be of any assistance, please do not hesitate to call.

Documents

Locations

Birth certificate(s) _____
Visa/Passport _____
Adoption papers _____
Will(s) _____
Trust agreements _____
Family love letters _____
Burial instructions _____
Power of attorney _____
Guardianship documents _____
List of special bequests _____
Safe combination, home _____
Safe combination, business _____
Life insurance, group _____
Life insurance, personal _____
Other death benefits _____
Health insurance policy _____
Auto insurance policy _____
Auto title(s) _____
Auto registration(s) _____

Documents

Locations

Homeowners insurance policy _____
Mortgage papers _____
Real estate titles/deeds _____
Rental property records _____
Boat title(s) _____
Boat insurance _____
Social Security card _____
Military service records _____
Employment contracts _____
Retirement plan _____
Employee benefits plan _____
IRA documents _____
Brokerage account records _____
Notes and other loan papers _____
Divorce/separation records _____
Contacts for relatives _____
Cemetery lot titles(s) _____
Safe deposit box _____
Safe deposit box key _____

Credit Cards

Account Numbers

Bank Accounts

Account Numbers

Professional Relationships

Investment Professional:

Insurance Agent:

Banker:

Attorney:

Executor/Trustee:

CPA/Accountant:

Contact Numbers

