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Personal Document Locator

Personal Document Locator

Please keep in a secure location.

This Personal Document Locator is simply a detailed list of where you store your important records and papers and who your primary advisors and contacts are. This list will assist your loved ones in the event of your death or disability. Keep this list at home along with your other important documents, and make sure a trusted family member knows where it is, or provide a copy to the family member, your executor, and/or your attorney.

Remember to update your Personal Document Locator at least once a year to ensure its accuracy.

Part A -- Personal Information
Name (first, middle, last)
Street Address
City, State, ZIP Code
Social Security Number
Date of Birth
Place of Birth

Part B -- Personal Contacts	
Attorney	
Name	Firm Name
Address	City, State, ZIP
Phone Number(s)	
Tax Preparer	
Name	Firm Name
Address	City, State, ZIP
Phone Number(s)	
Insurance Agent	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	
Financial Advisor	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	

Part B continued -- Online Accounts

Website Address (URL)	Username	Password

Notes

Part C -- Location Key
Specify the location(s) where you keep your documents (e.g., home, office, safe, safe-deposit box). For each item in Part D, check the number that corresponds to the correct location.
Location 1
Location 2
Location 3
Location 4
Location 5

Part D -- Important Documents	1	2	3	4	5
Will	☐	☐	☐	☐	☐
Durable Power of Attorney	☐	☐	☐	☐	☐
Health-Care Directives	☐	☐	☐	☐	☐
Trust Agreements	☐	☐	☐	☐	☐
Birth Certificate	☐	☐	☐	☐	☐
Social Security Card	☐	☐	☐	☐	☐
Marriage Certificate	☐	☐	☐	☐	☐
Military Papers	☐	☐	☐	☐	☐
Adoption Papers	☐	☐	☐	☐	☐

Part D continued	1	2	3	4	5
Divorce/Separation Papers					
Vehicle Titles					
Deeds					
Safe-Deposit Box/Keys					
Bank Account Records (e.g., checking and savings accounts, CDs)					
Tax Returns					
Mortgage and Loan Papers					
Insurance Policies -- Home and Vehicles					
Insurance Policies -- Property and Casualty					
Insurance Policies -- Life					
Insurance Policies -- Health					
Business Papers (e.g., incorporation papers, trademarks, patents)					
Retirement Account Papers (e.g., IRAs, annuities)					
Investment Papers (e.g., securities, stocks, bonds, mutual funds)					
Proof of Citizenship					
Important Keys					
Antiques and Heirlooms					
Jewelry					
Cash					
Funeral Instructions (e.g., cemetery plot deed, burial instructions)					

Notes

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