

## LOCATION OF IMPORTANT DOCUMENTS

FOR \_\_\_\_\_

Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Spouse \_\_\_\_\_

Social Security No. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

My valuable papers and assets are stored in these locations:

(A) Residence \_\_\_\_\_  
(Where)

(B) Safe-Deposit Box \_\_\_\_\_  
(Bank) (Address)

(C) Lawyer's Office \_\_\_\_\_  
(Address)

(D) \_\_\_\_\_

(E) \_\_\_\_\_

Note: Place location in ( ) below.

ITEM	LOCATION	ITEM	LOCATION	ITEM	LOCATION
Will (original)	( )	Umbrella policy	( )	Auto ownership records	( )
Will (copy)	( )	Disability insurance	( )	Mortgage agreement	( )
Trust agreements	( )	Employment contracts	( )	Real estate titles and deeds	( )
Power of Attorney (POA)	( )	Partnership agreements	( )	Title insurance	( )
Medical directive	( )	Business records	( )	Mortgage agreement	( )
Burial instructions	( )	Net worth statement	( )	Rental property records	( )
Cemetery plot deed	( )	Tax returns	( )	Loan agreements	( )
Spouse's will (original)	( )	Bank statements	( )	Home contents list	( )
Spouse's will (copy)	( )	Credit card list	( )	Boat ownership records	( )
Spouse's POA	( )	Certificates of Deposit	( )	Warranty records	( )
Spouse's medical directive	( )	Check book	( )	Birth certificates	( )
Spouse's burial instructions	( )	Savings passbook	( )	Adoption papers	( )
Children's guardian document	( )	Record of investments	( )	Diplomas	( )
Letter of instruction	( )	Stock certificates	( )	Discharge papers	( )
Safe combination	( )	Mutual funds	( )	Marriage certificate	( )
Safety deposit box	( )	Bonds	( )	Separation records	( )
Social Security card	( )	Other securities	( )	Divorce records	( )
Life insurance, group	( )	Retirement plans	( )	Citizenship papers	( )
Life insurance, individual	( )	Annuity contracts	( )	List of relatives and friends	( )
Other death benefits	( )	Stock option plans	( )	List of advisors	( )
Health insurance policy	( )	Stock purchase plan	( )	Professional memberships	( )
Auto insurance policy	( )	Profit sharing plan	( )	Medical records	( )
Homeowners policy	( )	Savings bonds	( )	Computer passwords	( )
Long term care insurance policy	( )		( )	PIN numbers	( )