

Personal Document Locator

Compliments of



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888-518-7878 (toll free)
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Personal Document Locator

Please keep in a secure location.

This Personal Document Locator is 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 with your other important documents, and make sure a trusted family member knows where it is, or provide a copy to a 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
Phone Number(s)
Social Security Number
Date of Birth
Place of Birth

Part B -- Personal Contacts

Financial Advisor	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	
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)	
Other	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	
Other	
Name	Company Name
Address	City, State, ZIP
Phone Number(s)	

Part D – Location Key

Specify the location(s) where you keep your documents (e.g., home, office, safe, safe-deposit box).
For each item in Part E, check the number that corresponds to the correct location.

Location 1
Location 2
Location 3
Location 4
Location 5

Part E – 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 Powers					
Adoption Papers					
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					

Notes