

One of the difficulties facing your heirs after your death will be locating all the relevant documents to help dispose of your estate in the manner your directed. This Personal Document Locator will help you record the location of your valuable papers, assets and other important items. It will prove invaluable to others in locating these items after your passing.

Should you keep all your important documents in a safe deposit box? No. Safe deposit boxes are excellent for most important financial and legal documents, but there are some documents you shouldn't keep there.

Keep your will and life insurance policies somewhere else. Generally, your safe deposit box will be locked upon your death – just when these important documents will be needed most.

Personal Information

Name _____ Date _____
Residence address _____
Office address _____
Safe deposit box _____
Number Bank
Address

Personal Papers

Birth certificate _____
Baptismal certificate _____
Medical records _____
Burial records _____
Letter of last instruction _____
Other _____

Insurance Policies

Life _____
Disability _____
Health/Medical _____
Long-term health care _____
Homeowner's/rental _____
Other _____

Legal Documents

Marriage certificate

Divorce papers

Social Security card

Power of Attorney

Will and trust agreements

Veteran's papers

Living will and health
care proxy

Other

Financial Documents

Mortgage papers

Bank/brokerage house
Account papers

Stock/bond certificates

Income tax returns

Gift tax returns

Employee benefit data

Other

Titles and Deeds

Automobile

House

Other real estate

Cemetery plot

Other

Important People

Accountant

Name

Address

Phone

Attorney

Name

Address

Phone

Banker

Name

Address

Phone

Employer

Name

Address

Phone

Financial management professional

Name

Address

Phone

Insurance agent

Name

Address

Phone

Stock Broker

Name

Address

Phone

Primary Physician

Name

Address

Phone

Other

Name

Address

Phone

Other

Name

Address

Phone

Institutions

Bank (*savings*)

Name

Address

Phone

Bank (*checking*)

Name

Address

Phone

Credit union

Name

Address

Phone

Money market fund

Name

Address

Phone

Savings and loan

Name

Address

Phone

Other

Name

Address

Phone

Other

Name

Address

Phone

Other

Name

Address

Phone

Other

Name

Address

Phone

Other

Name

Address

Phone