# DOCUMENT LOCATION RECORDS

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Social Security No.: \_\_\_\_\_\_-\_\_\_-\_\_\_\_\_\_\_ Spouse: \_\_\_\_\_\_-\_\_\_-\_\_\_\_\_\_\_

1. Residence Locations:

1. Safe Deposit Box Number: Bank:

Bank Address:

1. Office Location:
2. Attorney: Name & Address:



| **Description of the**  **Document or Vital Record** | **Location as Listed Above** | | | | | |
| --- | --- | --- | --- | --- | --- | --- |
| **A** | **B** | **C** | **D** | **E** | **F** |
| My Will (original) ………………………. |  |  |  |  |  |  |
| My Will (copy) ...………………………. |  |  |  |  |  |  |
| Powers of Attorney Agreements …….. |  |  |  |  |  |  |
| Burial Instructions ……………………... |  |  |  |  |  |  |
| Cemetery Plot Deed ..………………... |  |  |  |  |  |  |
| Spouse’s Will (original) ……………….. |  |  |  |  |  |  |
| Spouse’s Will (copy) ………………….. |  |  |  |  |  |  |
| Spouse’s Burial Instructions …………. |  |  |  |  |  |  |
| Document Appointing Guardians ……. |  |  |  |  |  |  |
| Written Special Bequest List …………. |  |  |  |  |  |  |
| Trust Agreements ..…………………… |  |  |  |  |  |  |
| Life Insurance (group) ………………… |  |  |  |  |  |  |
| Life Insurance (individual) ……………. |  |  |  |  |  |  |
| Other Death Benefits …………………. |  |  |  |  |  |  |
| Property & Casualty Insurance ……… |  |  |  |  |  |  |
| Health Insurance Policy .....…………... |  |  |  |  |  |  |
| Homeowners Insurance Policy .……… |  |  |  |  |  |  |
| List of Residence Contents ..…………. |  |  |  |  |  |  |
| Car Insurance Policy ………………….. |  |  |  |  |  |  |
| Employment Contracts ……………….. |  |  |  |  |  |  |
| Partnership Agreements ……………… |  |  |  |  |  |  |
| List Checking/Savings Accts .………... |  |  |  |  |  |  |
| Bank Statements & Checks ....………. |  |  |  |  |  |  |
| List of Credit Cards …………………… |  |  |  |  |  |  |
| Certificates of Deposit .....…………….. |  |  |  |  |  |  |
| Checkbooks ..................………………. |  |  |  |  |  |  |
| Savings Passbooks ...........…………… |  |  |  |  |  |  |
| Safe Combination (business) .……….. |  |  |  |  |  |  |
| Safe Combination (home) .....………… |  |  |  |  |  |  |
| Stock Purchase Plan …………………. |  |  |  |  |  |  |
| Profit Sharing Plan ……………………. |  |  |  |  |  |  |
| Former Employer Benefit Plans ..…… |  |  |  |  |  |  |
| Income Tax Returns ………………….. |  |  |  |  |  |  |
| Titles & Deeds to Real Estate ……….. |  |  |  |  |  |  |
| Title Insurance Policy …………………. |  |  |  |  |  |  |
| Rental Property Records ……………... |  |  |  |  |  |  |
| Debt Notes & Loan Agreements …….. |  |  |  |  |  |  |
| Co-op or Condominium Agreements .. |  |  |  |  |  |  |
| Time-Sharing Agreements …………… |  |  |  |  |  |  |
| Rental Agreements …………………… |  |  |  |  |  |  |
| Property Lease Agreements …………. |  |  |  |  |  |  |
| Vehicle Lease Agreements …………... |  |  |  |  |  |  |
| Stock Certificates ……………………… |  |  |  |  |  |  |
| Bond Certificates ……………………… |  |  |  |  |  |  |
| Limited Partnership Papers ………….. |  |  |  |  |  |  |
| Other Agreements of Value ………….. |  |  |  |  |  |  |
| Family Trust Agreements …………….. |  |  |  |  |  |  |
| Family Estate Bequests ………………. |  |  |  |  |  |  |
| List of Stored Possessions …………… |  |  |  |  |  |  |
| List of Loaned Possessions ………….. |  |  |  |  |  |  |
| Auto Ownership Records …………….. |  |  |  |  |  |  |
| Boat Ownership Records …………….. |  |  |  |  |  |  |
| Art & Other Ownership Records …….. |  |  |  |  |  |  |
| Birth Certificates ………………………. |  |  |  |  |  |  |
| Citizenship Papers ……………………. |  |  |  |  |  |  |
| Adoption Papers ………………………. |  |  |  |  |  |  |
| Military Discharge Papers ……………. |  |  |  |  |  |  |
| Marriage Certificate …………………… |  |  |  |  |  |  |
| Children’s Birth Certificates ………….. |  |  |  |  |  |  |
| Children’s Adoption Papers ………….. |  |  |  |  |  |  |
| Divorce/Separation Papers ………….. |  |  |  |  |  |  |
| Names & Addresses of Relatives …… |  |  |  |  |  |  |
| Names & Addresses of Friends ……... |  |  |  |  |  |  |
| Professional Memberships List ……… |  |  |  |  |  |  |
| Fraternal/Civic Membership List …….. |  |  |  |  |  |  |
| Passports ………………………………. |  |  |  |  |  |  |
| Tax Returns ……………………………. |  |  |  |  |  |  |
| Computer Passwords – Written List…. |  |  |  |  |  |  |
| …………………………………………… |  |  |  |  |  |  |
| …………………………………………… |  |  |  |  |  |  |
| …………………………………………… |  |  |  |  |  |  |
| …………………………………………… |  |  |  |  |  |  |