

This Personal Document Locator is intended as a helpful tool to record the location of valuable papers, assets, and other important items. It will assist your spouse, family, designated POAs, and executors in locating all your relevant documents should the need arise following your incapacity or death and disposing of your estate in the manner you directed. This form is for informational purposes only and not intended to replace any legal documents.

You may want to consider the following items:

- ❖ **People to Notify** – providing names and addresses of your family, advisors and others to notify will help streamline the estate process
- ❖ **Funeral Arrangements** – communicate any special arrangements and details
- ❖ **POA/ Health Care Proxy/ Wills / Trusts** – List any legal documents you have established and include the name and contact information of the Agent, Trustee and contents of the Trust.
- ❖ **Location of Personal Papers** – Use locator to record location of personal documents (e.g., safe deposit box, desk, dresser, file drawer, etc.)
- ❖ **Valuables** – Maintain a list of valuables and consider a letter of instruction if you wish a specific item to be given to a specific individual. While this is not legally binding most last requests will be honored.
- ❖ **Digital Assets** – List a login and password to any “electronic record” that you own, license, or control: financial accounts, email, social media accounts, cloud storage, chatrooms, books & music, gaming and just about anything else that you do online that requires a login. Maintain in a safe place.
- ❖ **Special Assets** – List any special assets that require action by your executor within a specific time frame (i.e. employee benefit election)
- ❖ **Create a Personal Legacy** – Consider writing a letter for future generations with personal thoughts and messages for your heirs.

PERSONAL DOCUMENT LOCATOR

Personal Information

Name _____

Social Security # _____ DOB _____

Residence address _____

Office Address _____

Safe Deposit Box Address _____

Professional Advisors (contact)

Financial Advisor _____

Address _____ Phone _____

Attorney _____

Address _____ Phone _____

Accountant _____

Address _____ Phone _____

Employee Benefit Manager _____ Phone _____

Insurance Agent _____ Phone _____

Primary Physician _____ Phone _____

Clergy _____ Phone _____

Executor / Trustee _____

Address _____ Phone _____

Other _____ Address _____ Phone _____

Other _____ Address _____ Phone _____

Personal Papers (location)

Medical Records _____

Burial Directions _____

Letter of Last Instruction _____

Appraisals _____

Other _____

Other _____

Legal Documents (location)

Birth Certificate _____

Passport _____

Marriage Certificate _____

Divorce Papers _____

Adoption Papers _____

Social Security Card _____

Military Papers _____

Will / Trust _____

Business Entity _____

Other _____

Other _____

Deeds and Titles (location)

Real Estate Deed _____

Vehicle Title _____

Cemetery plot _____

Other _____

Financial Documents (location)

Mortgage Papers _____

Bank Account _____

Bank Account _____

Investment Account _____

Investment Account _____

Life Insurance Policies _____

Life Insurance Policies _____

Disability Policy _____

Long Term Care _____

Home Owners/ Auto Insurance Policy _____

Income Tax Returns _____

Gift Tax Returns _____

Employee Benefit Data _____

Credit Cards _____

Credit Cards _____

Credit Cards _____

Credit Cards _____

Other _____

Other _____

Other _____

Other _____

Other _____

Other _____

Other

Antiques and Heirlooms _____

Cash _____

Jewelry _____

Keys _____

Other _____

Other _____

Notes:

Digital Assets (location of login and password)

Cell phone _____

Laptop _____

Computer _____

Brokerage account _____

Bank account _____

Credit card _____

Email address _____

Social media (Facebook, LinkedIn, twitter, etc.) _____

Books and music _____

Chatrooms _____

Subscriptions _____

File sharing _____

Other _____

Digital Assets (login & password – maintain in a safe place)

Devices (cell phone, laptop, computer)

Type : _____

Username/ID: _____

Case-Sensitive Password: _____

Financial Accounts (brokerage accounts, bank accounts, credit cards, etc.)

Institution: _____

Username/ID: _____

Case-Sensitive Password: _____

Security Question: _____

Answer to Security Question: _____

Secondary Security Question: _____

Answer to Secondary Security Question: _____

Email Accounts

Email Provider: _____

Email Address: _____

Case-Sensitive Password: _____

Social Media Accounts (Facebook, LinkedIn, Twitter)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____

Digital Asset (books & music)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____

Digital Asset (other)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____

Digital Asset (other)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____

Digital Asset (other)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____

Digital Asset (other)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____

Digital Asset (other)

Account Type: _____

Username/ID: _____

Case-Sensitive Password: _____