

**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 family in locating all of your relevant documents and disposing of your estate in the manner you directed. This form is not intended to replace any legal documents.**

**You may want to consider the following items as you develop your locator:**

- ❖ **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
- ❖ **Wills / Trusts** – List any legal documents you have established and include the name and contact information of the Trustee and contents of the Trust.
- ❖ **Location of Personal Papers** – Use locator to record location of personal documents (safe deposit, 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.
- ❖ **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

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**

Medical Records \_\_\_\_\_

Burial Directions \_\_\_\_\_

Letter of Last Instruction \_\_\_\_\_

Appraisals \_\_\_\_\_

Other \_\_\_\_\_

Other \_\_\_\_\_

**Legal Documents**

Birth Certificate \_\_\_\_\_

Passport \_\_\_\_\_

Marriage Certificate \_\_\_\_\_

Divorce Papers \_\_\_\_\_

Adoption Papers \_\_\_\_\_

Social Security Card \_\_\_\_\_

Military Papers \_\_\_\_\_

Will / Trust \_\_\_\_\_

Business Entity \_\_\_\_\_

Other \_\_\_\_\_

Other \_\_\_\_\_

**Deeds and Titles**

Real Estate Deed \_\_\_\_\_

Vehicle Title \_\_\_\_\_

Cemetery plot \_\_\_\_\_

Other \_\_\_\_\_

**Financial Documents**

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:**