

ESSENTIAL DOCUMENT LOCATOR

It is the sad experience of many families to have to search, often in vain, for important papers and documents requested by various entities and government agencies soon after the death of a family member.

By completing this checklist now, you can save your family untold hours of searching and anxiety. It will assist them in locating papers and items you probably had no idea they needed. You may need to contact some government offices to locate some items and you may need to make lists of other assets.

We will list five possible locations. Each asset should be (or should be placed) in one of these areas. Some areas have more than one location. For example, if your will is at home in your safe, you would circle **B** and **1**. If you do not have an item, simply place a **G** by that item. Some items may be in more than one location, be sure to note each location.

LOCATIONS

- A.** SAFE DEPOSIT BOX located at _____ bank located at _____, box # _____.
KEY is located _____.
- B.** RESIDENCE - (1) SAFE (2) FILE CABINET (3) DESK (4) OTHER _____.
- C.** BUSINESS OFFICE - (1) SAFE (2) FILE CABINET (3) DESK (4) PERSONNEL OFFICE (5) OTHER _____.
- D.** PERSONAL HANDBOOK, which is located _____.
- E.** WITH ATTORNEY - Name _____ Phone _____.
- F.** OTHER _____.
- G.** I do not have one of these.

BANK RECORDS

List of all savings and checking accounts
Bank statements
Cancelled checks
Checkbooks
Certificates of deposit
Savings passbook

A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___

INSURANCE POLICIES

Property and casualty policies
Health insurance
Life insurance, individual
Life insurance, group
Other insurance
Other death benefits

A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___
A	___	B	___	C	___	D	___	E	___	F	___	G	___

INVESTMENTS

Bonds and lists of bonds owned
Brokerage account records
Mutual funds records
Partnership agreements
Lists of partnerships
Record of securities
Stock certificates
Stock option plan
T-bill

A ___ B ___ C ___ D ___ E ___ F ___ G ___
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CHILDREN'S ASSETS

Savings Accounts
Brokerage Accounts
Mutual fund records
Pre-paid college records
Trust/custodial account records

A ___ B ___ C ___ D ___ E ___ F ___ G ___
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REAL ESTATE

Titles and deeds to real estate
Title insurance policies
Property and casualty insurance
Mortgages and notes
Termite Bond
Rental property records

A ___ B ___ C ___ D ___ E ___ F ___ G ___
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RETIREMENT PLANS

Annuity contracts
Corporate retirement plans
IRA documents
401 (k) plans
Pension/profit sharing plans
Other retirement plans
Beneficiary designations

A ___ B ___ C ___ D ___ E ___ F ___ G ___
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OTHER IMPORTANT RECORDS

Wills
Trust documents
Auto ownership records
Other vehicle ownership records
Safe combinations
Safety deposit box key
Passports
Birth certificates
Adoption papers
Marriage certificate
Divorce/separation papers
Military discharge papers
Tax returns
Names and addresses of family and friends
List of professional/fraternal organizations
List of credit cards w/addresses & tel. #'s
Other records:

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